ATHENA ADVANCED REPORTS

Training Guide

Education Logistics, Inc.

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.

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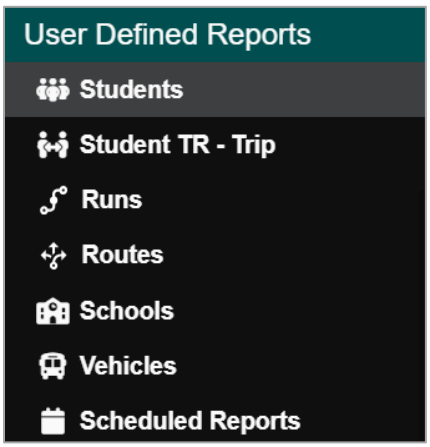
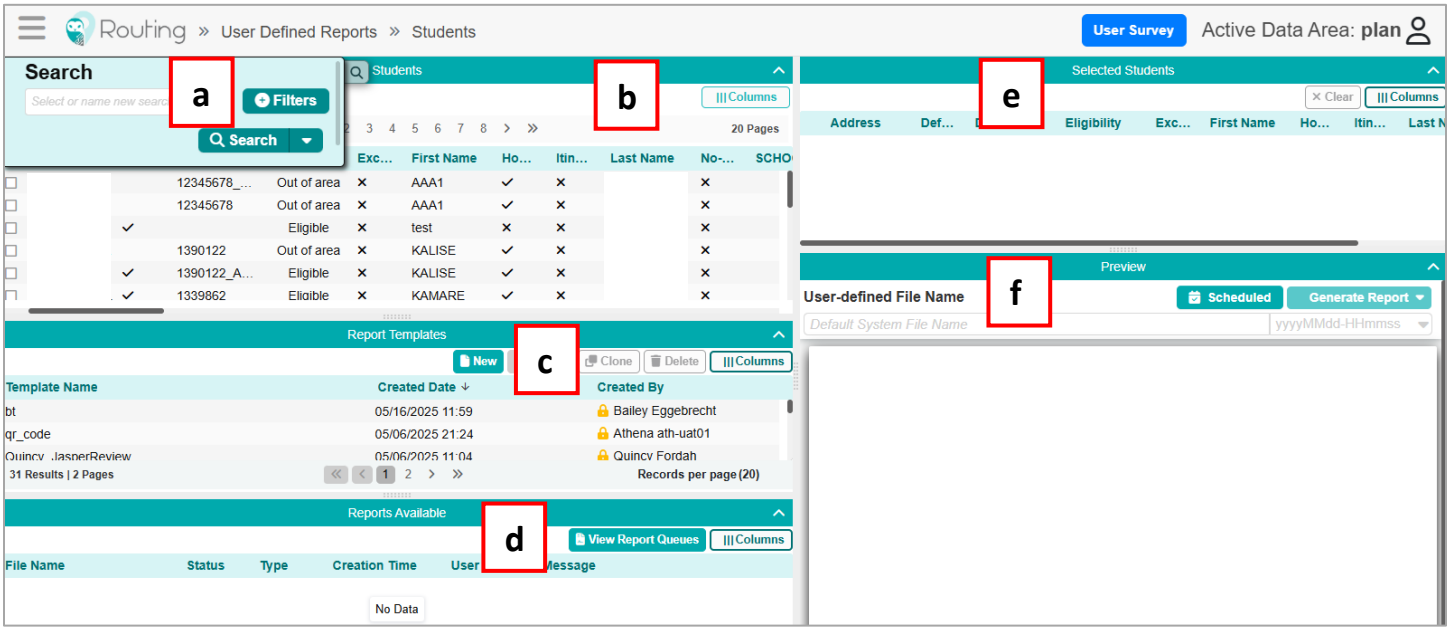


3. **Advanced Reporting Layout:**
   Within all advanced reporting modules, users will find same cards and tools within the reporting space:
   - **a.)** Search Tray
   - **b.)** Queried Data {Students}
   - **c.)** Report Templates
   - **d.)** Reports Available
   - **e.)** Selected Students
   - **f.)** Preview



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.

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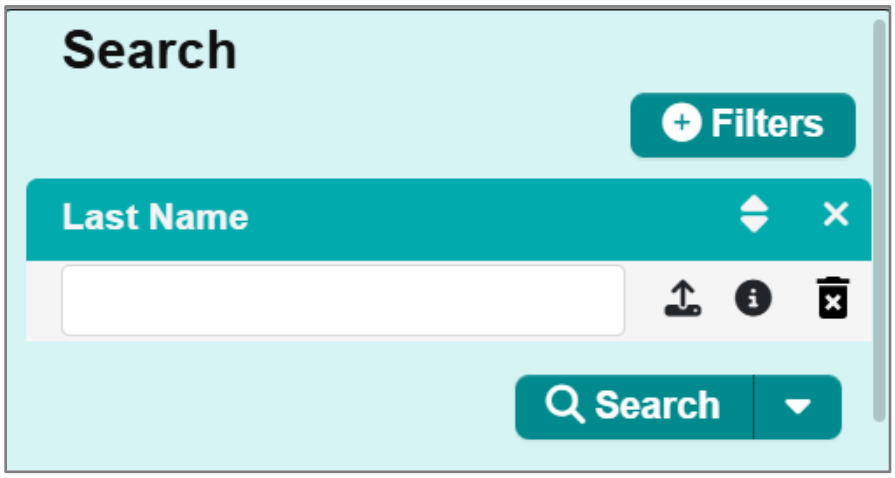
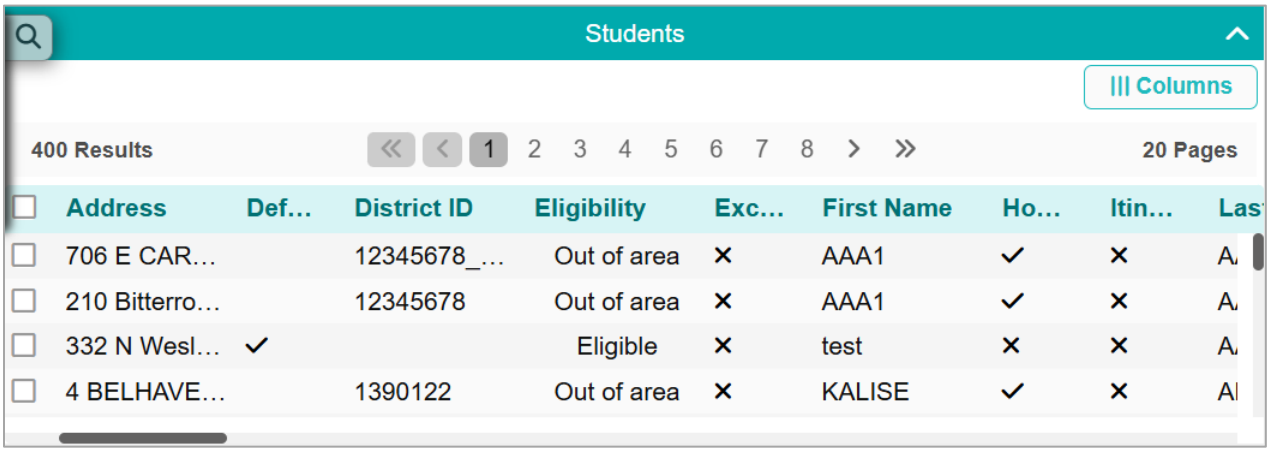


Queried Data – Students Card:

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.



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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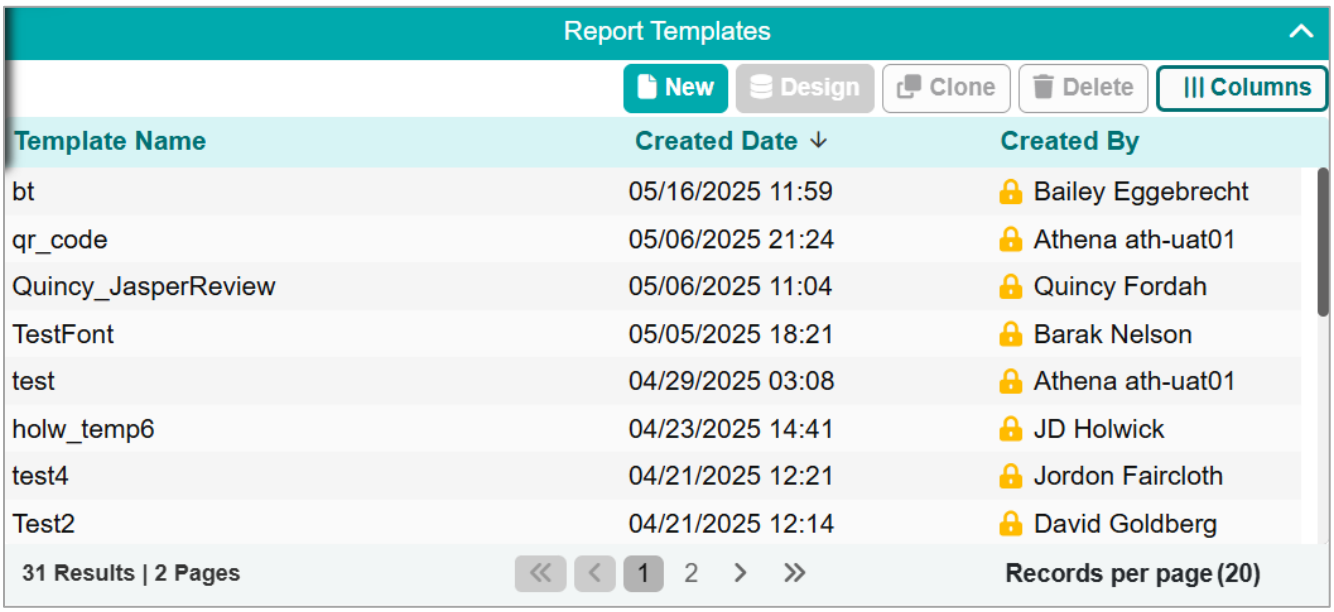
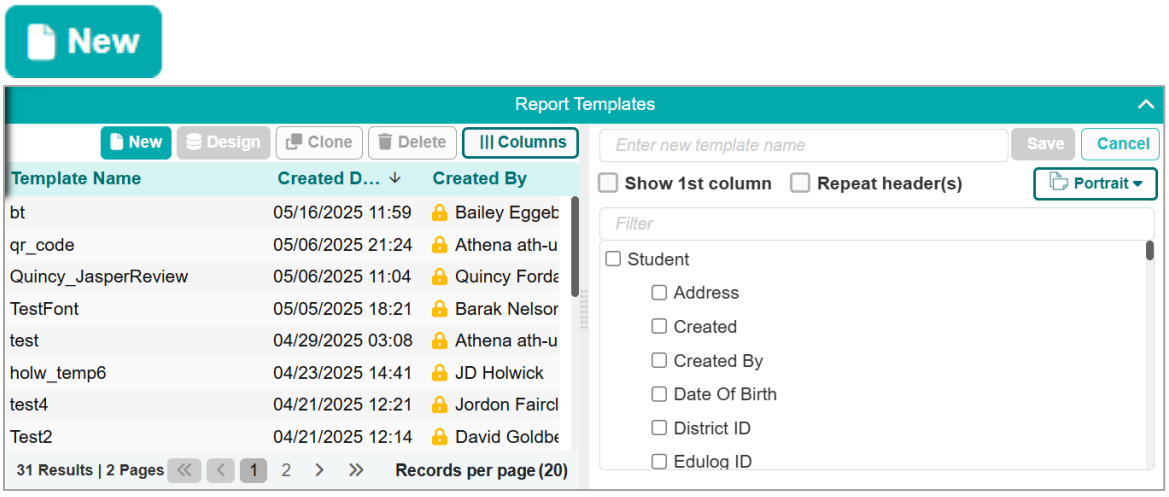


Note: All previously created templates within the Report Templates card will have either a gold or teal lock next to the creator's name. A template with a gold "locked" icon can only be edited by the creator, while a template with a green "unlocked" icon is editable for the user that created the report.

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.



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

b.) Design:

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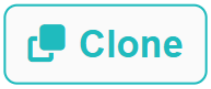
The "Design" tool can be used once a template is "unlocked." After selecting it, the user will be directed to a pop-out window where they can further customize elements of the report to their preferences.

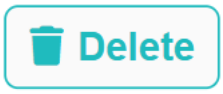
c.) Clone:

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:

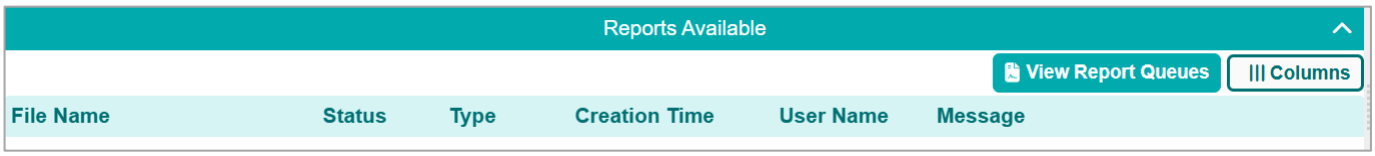
The Delete tool allows the user to delete unlocked templates.



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



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.

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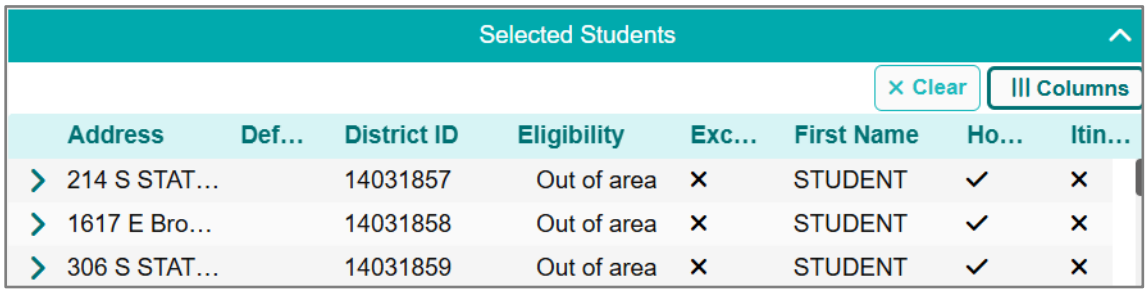
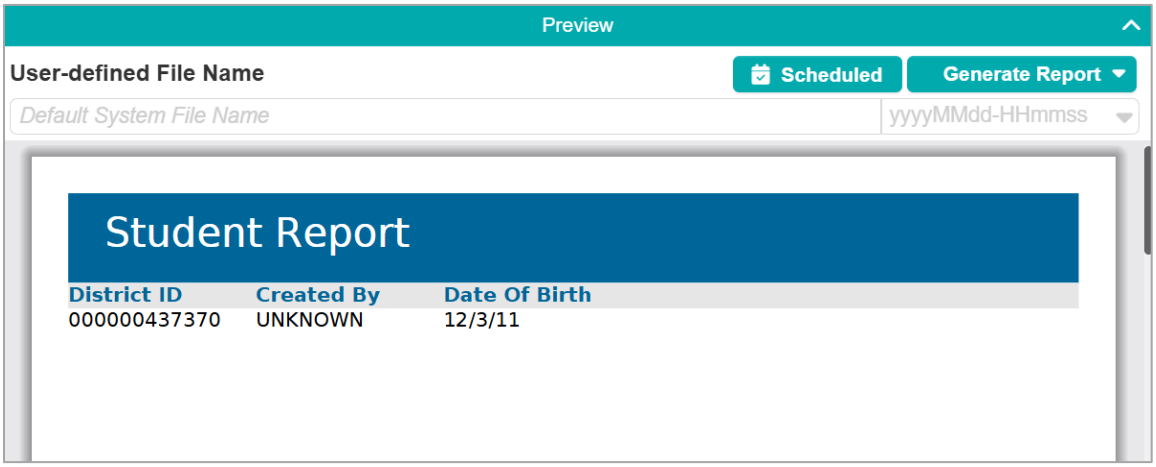


Preview:

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



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.

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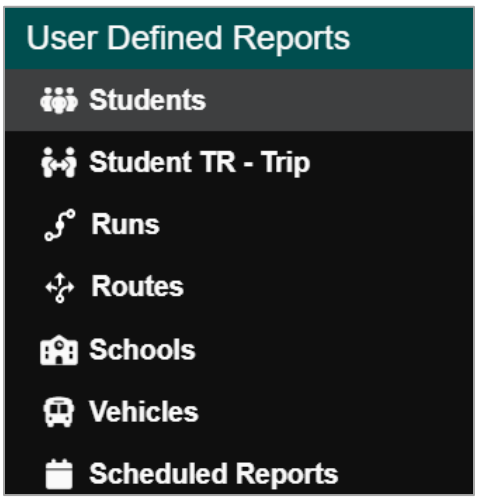
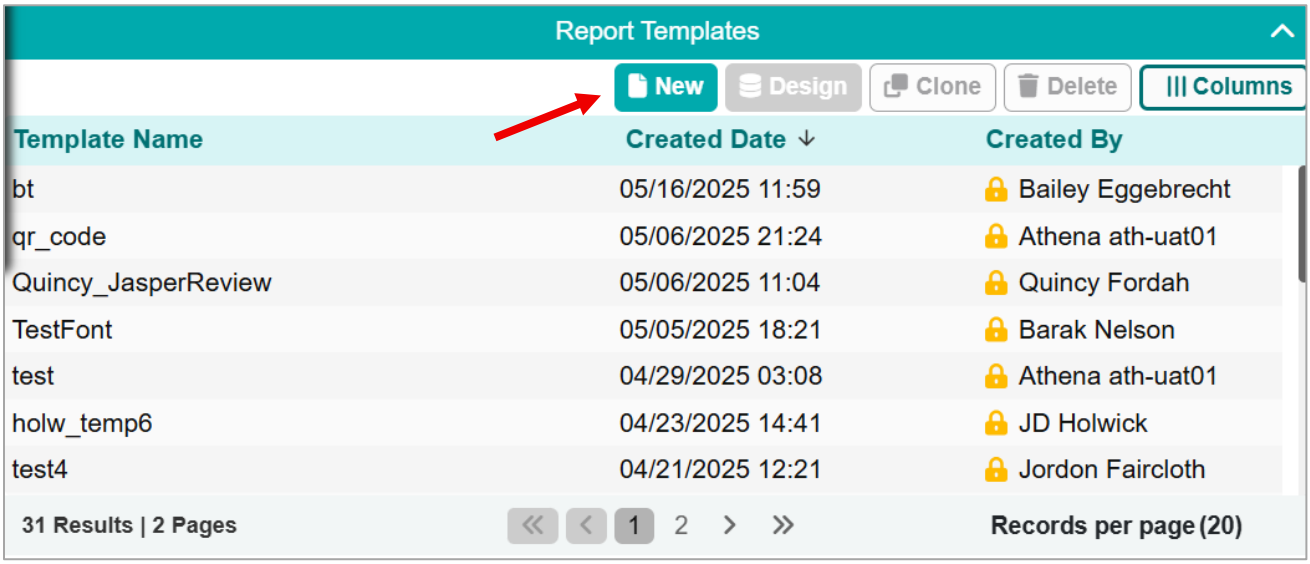


2. Within the Report Templates card, select “New”.



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

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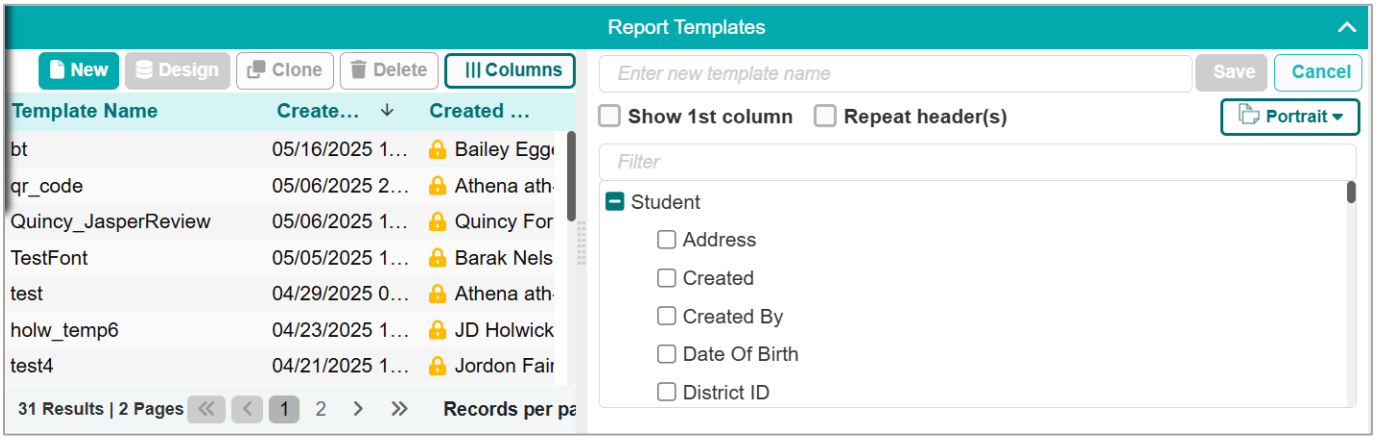
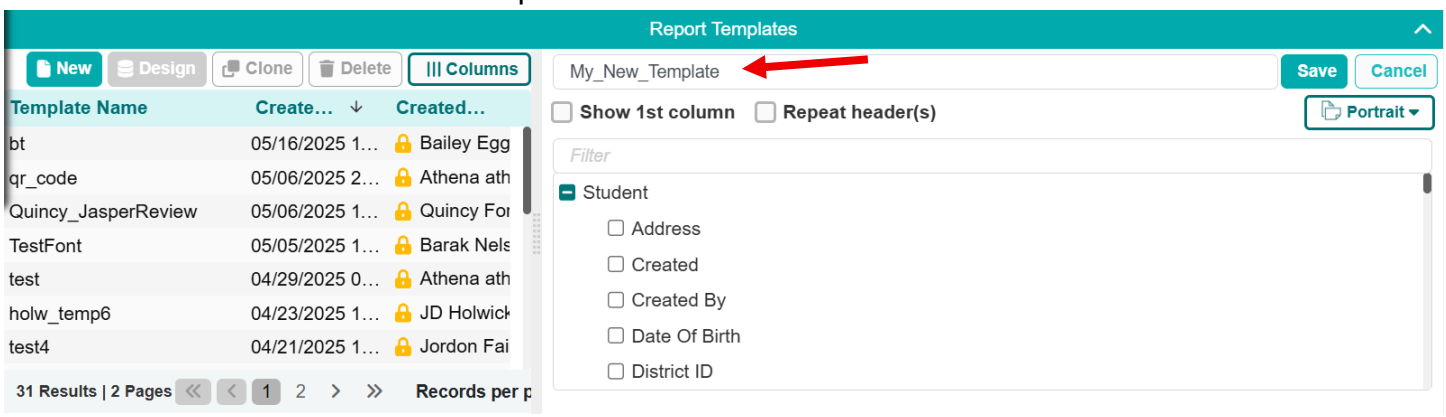
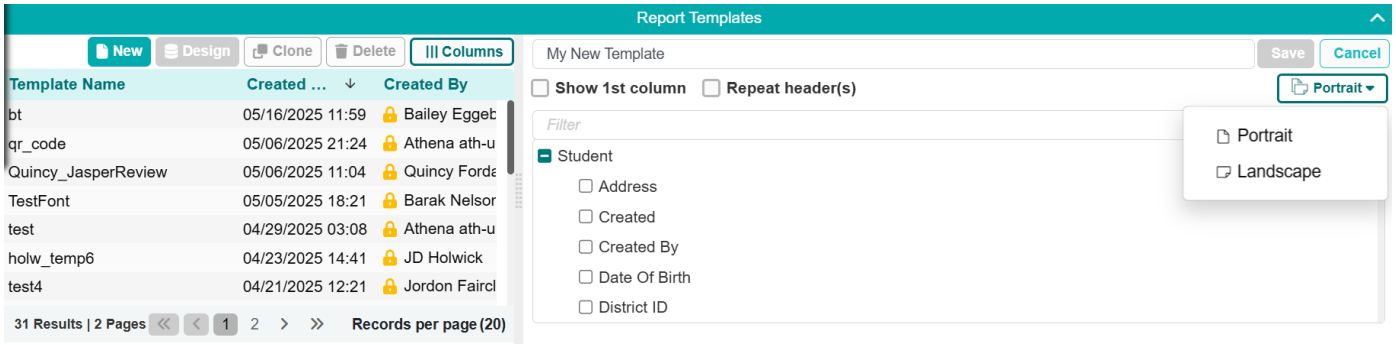


4. Add an identifiable name for the template.



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



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

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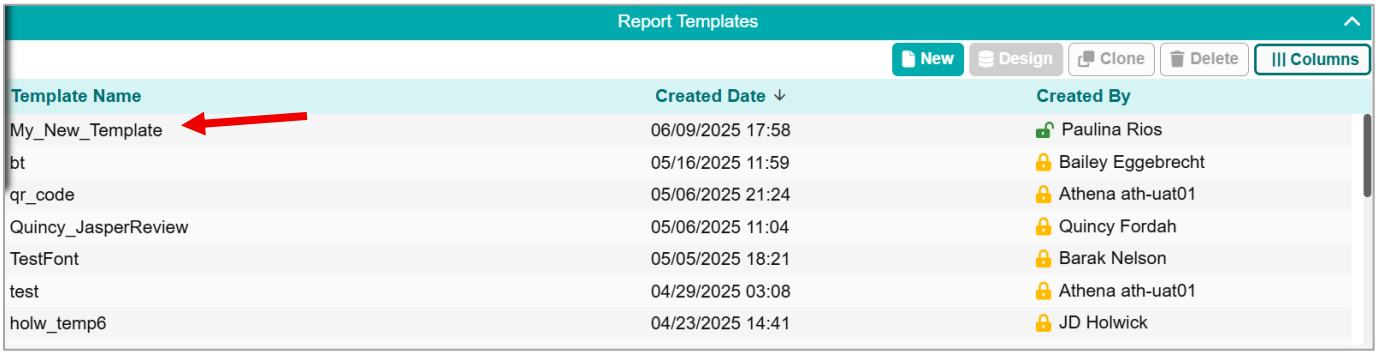
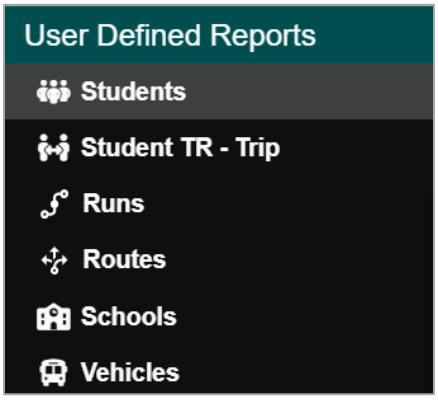


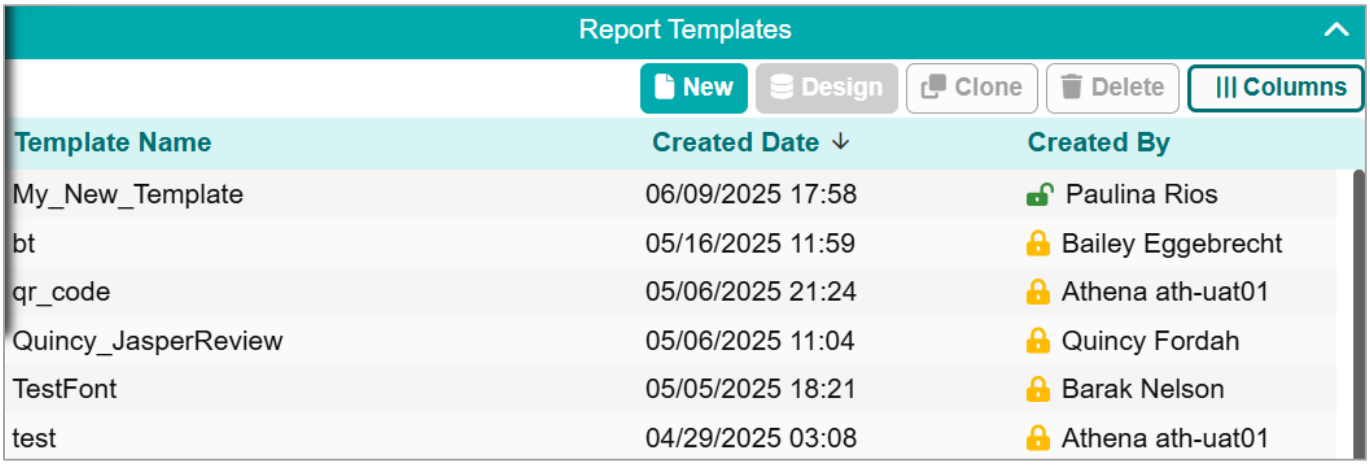
Clone a Template

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.



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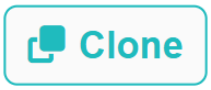
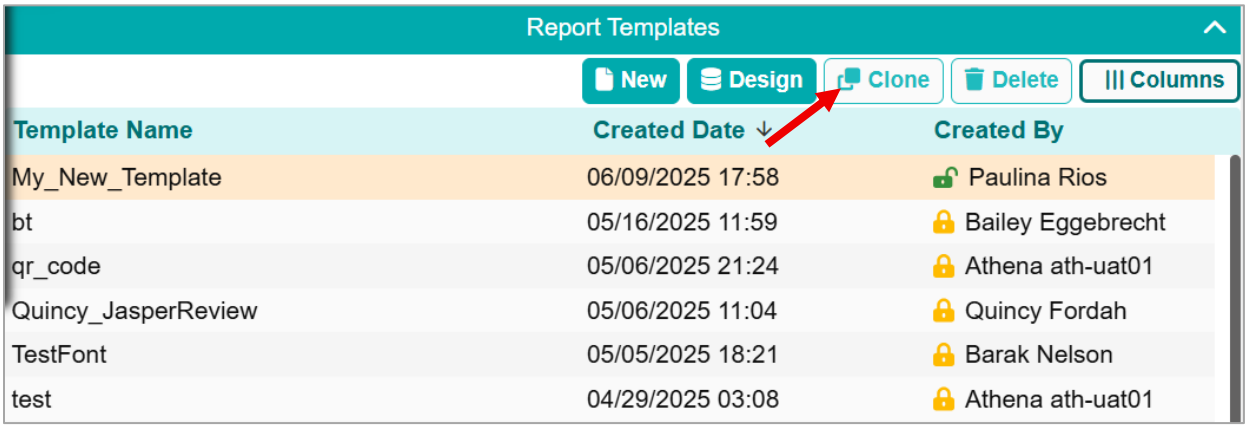
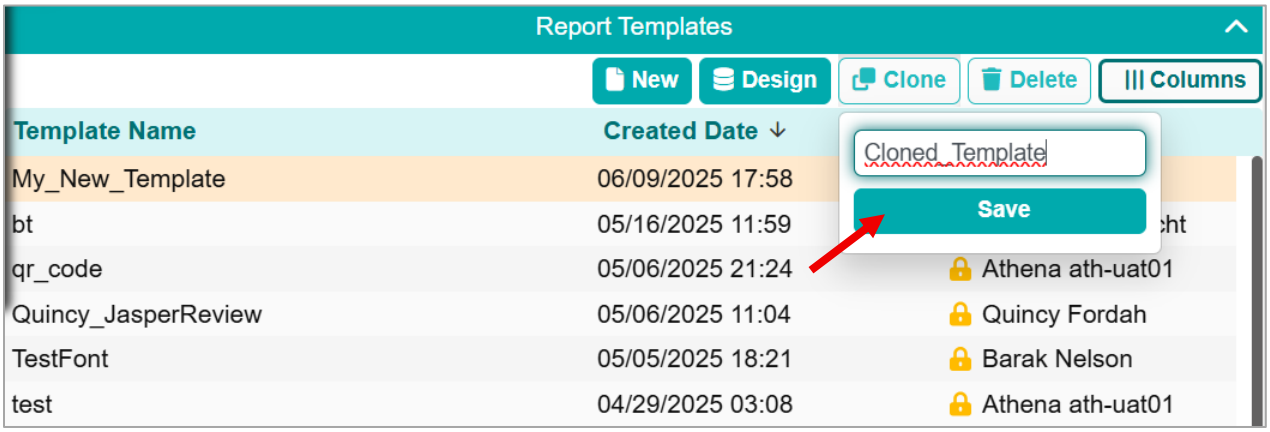
3. Once the template is selected, select the “Clone” tool.





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



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

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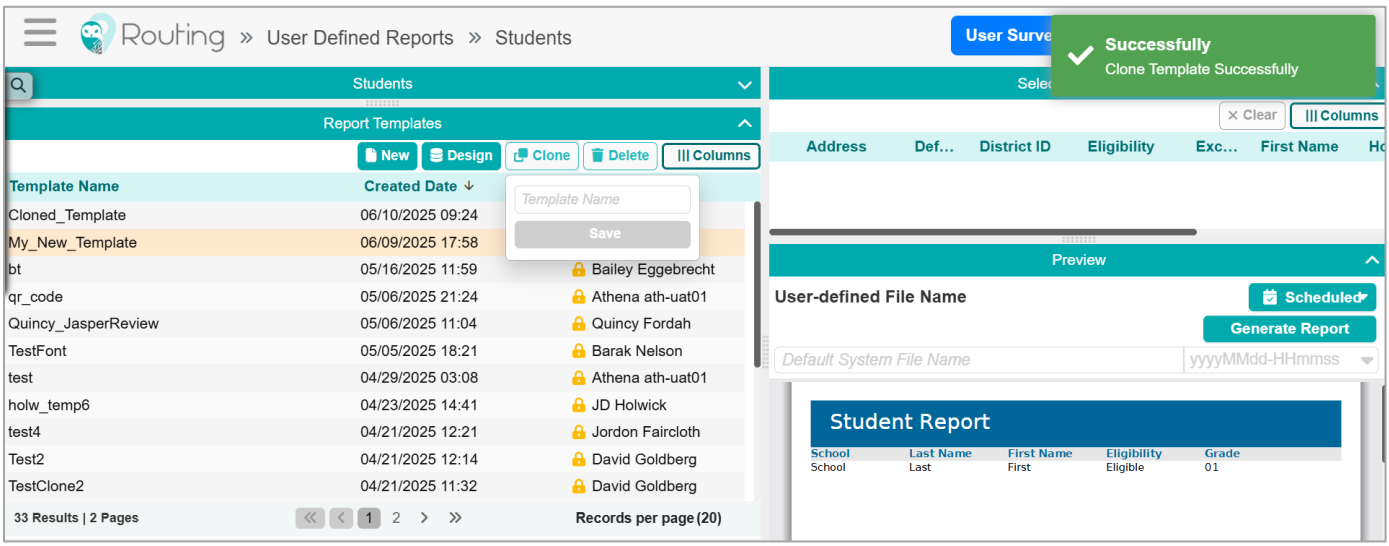

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