

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.

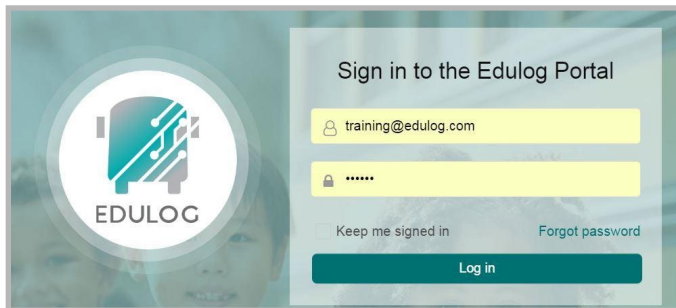
ATHENA REPORTING INTRODUCTION

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

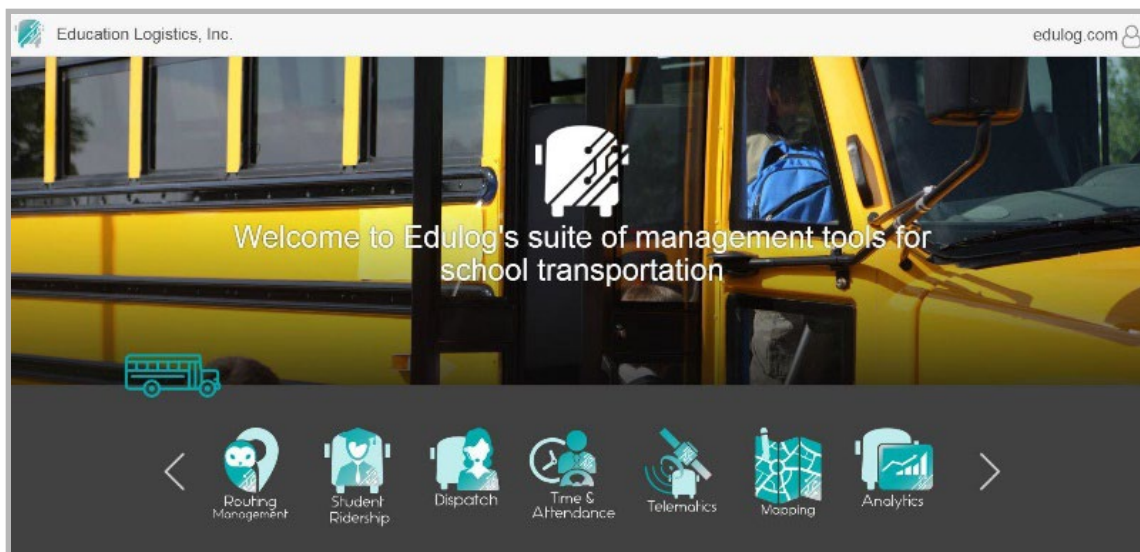
1. Sign In

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.



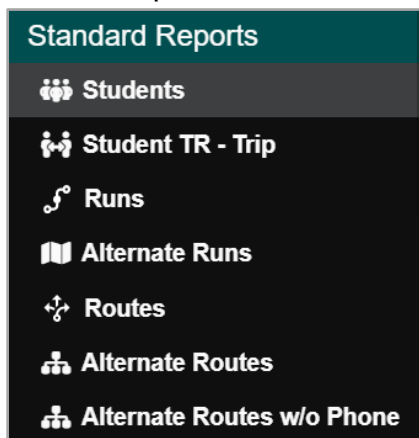
3. Routing Management

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



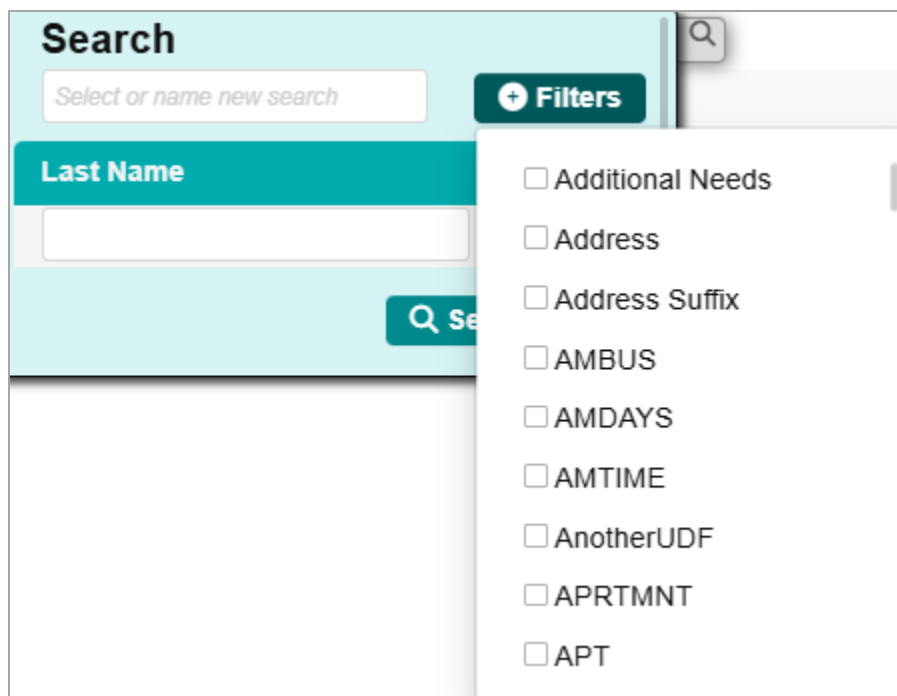
4. Reporting Modules

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

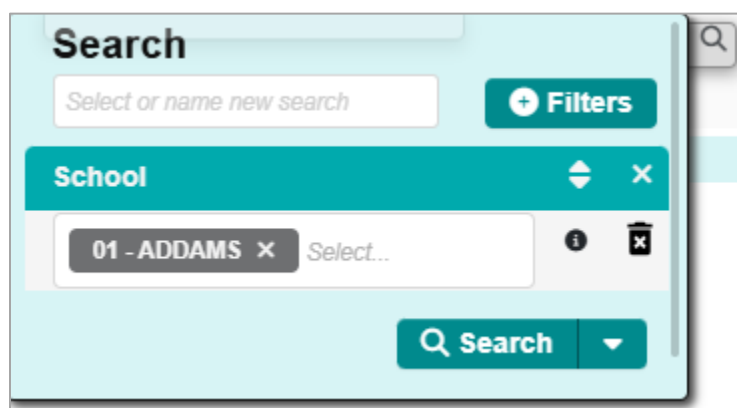


5. Reports Search Tray

The Search Tray will appear, and you will have the option to choose 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 'Select or name new search' field and making sure the 'Save Changes' box is selected. This will save your filter search condition. You may enter the name in this box later and the search filters will load.

Search

Filters

Name

☒ Save Changes

Search

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.

Routing

Standard Reports

Students

User Survey

Active Data Area: plan

400 Results

<<

<

1

2

3

4

5

6

7

8

>

>>

20 Pages

Columns

Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...
706 E CAR...		12345678_...	Out of area	x	AAA1	✓
210 Bitterr...		12345678	Out of area	x	AAA1	✓
332 N Wes...	✓		Eligible	x	test	x
4 BELHAV...		1390122	Out of area	x	KALISE	✓
5 RIDGE CT	✓	1390122_A...	Eligible	x	KALISE	✓
1149 N Da...	✓	1339862	Eligible	x	KAMARE	✓

Reports Available

View Reports Queue

Columns

File Name	Sta...	Type	Creation...	User ...	Message
sdfds_20250609-0...	Com...	Sche...	06/09/202...	Paulina...	

Selected Students

Clear

Columns

Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...	Itin...
706 E CAR...		12345678_...	Out of area	x	AAA1	✓	x
210 Bitterr...		12345678	Out of area	x	AAA1	✓	x
332 N Wesl...	✓		Eligible	x	test	x	x

Configure Report

Scheduled

Portrait

.pdf

Choose a configuration

Show 1st column

Repeat header(s)

Address

Created

Created By

Preview

User-defined File Name

Condensed

Header Style

Body Style

Default System File Name

yyyyMMdd-HHmms

Generate Report

1 Result | 1 Page

<<

<

1

>

>>

Records per page (20)

7. Configure Report

- First, select whether you want the report in a Portrait or Landscape view.

Portrait

.pdf

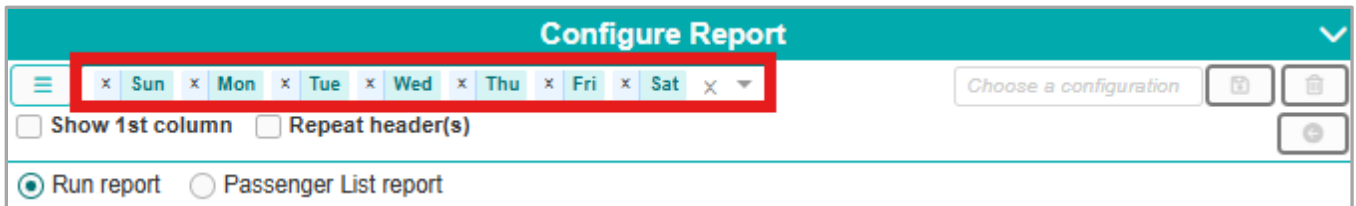
Portrait

Landscape

- Then select whether you want the report in a PDF or CSV file.



- 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.

Scheduled

Portrait

.pdf

Choose a configuration

☐ Show 1st column
☐ Repeat header(s)

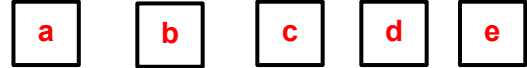
	<< Remove All	Field Order	Sort Order	Max length	Page	Header label
Address	<	Last Name	1	12	1	Header label
Created	<	First Name	2	12	1	Header label
Created By	<	Grade	3	12	1	Header label
Date Of Birth	<	Mailing Address	4	12	1	Header label
District ID	<	Phone Number	5	12	1	Header label
Edulog ID						
Eligibility						
Email						
Enrollment Date						
Exclusive Stop						
Gender						
Government ID						
Home Right Side						
Home Room Teacher						

- You can also remove a field by selecting the “Remove” button.



- **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, Last Name, First Name, Address, Phone Number, and Grade. To change the Field Order, drag and drop the field in the order you want it in.

b) Sort Order

The Sort Order allows the user to sort the 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 when you select Page, it 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.

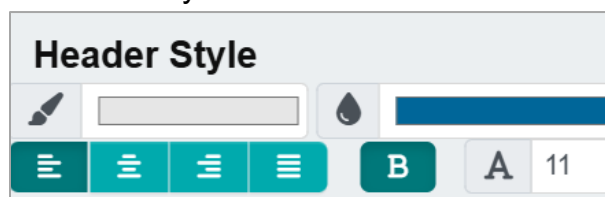
Student Report					
Last Name	First Name	Grade	Mailing Address	Phone Number	Addre
Last	First	01	999 ABC AVE	(555)666-9999	999 21ST AVE

- **Change Style**

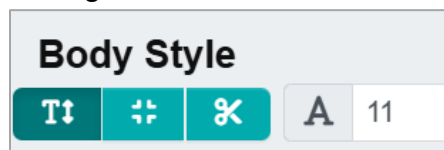
You can change the style of the report in several different ways: Condensed or Normal spacing, the Header Style and the Body Style.



- a) Select the 'Condensed' button, then select either Condensed or Normal spacing from the drop-down menu.
- b) When editing in the **Header Style**, you have several 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" within the 'Configure Report' card and then selecting 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

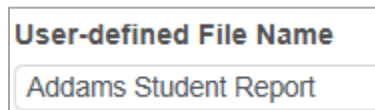
Once the fields are added, you will see a Preview of the report populate below. As you add and remove fields from the Configure Report card, the Preview card will update accordingly.

Student Report					
Last Name	First Name	Grade	Mailing Address	Phone Number	Address
Last	First	01	999 ABC AVE	(555)666-9999	999 21ST AVE

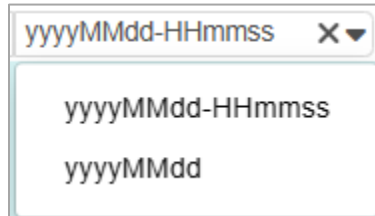
Note: The Preview is a sample report.

- **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 at the top. Below it, the text "Addams Student Report" is entered.

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

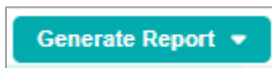
A dropdown menu with a light blue border. The selected option is "yyyyMMdd-HH:mm:ss". Below it, the option "yyyyMMdd" is visible.

Then select Save to save the name.

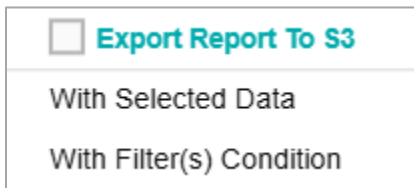
Note: You can also click the "X" to remove the date and time stamp entirely.

9. Generate Report

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

A green button with the text "Generate Report" and a small downward arrow.











There are three options in the Generate Report button.

A dropdown menu with a light blue border. The first option is "Export Report To S3" with a checkbox. Below it are "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 set up.
- **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		Columns
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 Configure 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 *

MM/DD/YYYY

Scheduled Time *

HH:MM

Filter Condition *

Configure Report *

User Defined Filename

yyyyMMdd-HHmss X

File name will be "configuration_name_yyyyMMdd-HHmss.pdf"

☐ Export Report To S3

☐ Public

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.
- Enter a 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.
- Select Save.

Create Schedule

Schedule

☒ One Time

Start Date *

02/14/2025

×

📅

Scheduled Time *

04:00 PM

×

🕒

☐ Daily

☐ Day(s) of the Week

Filter Condition *

Addams

×

▼

Configure Report *

Student List

×

▼

User Defined Filename

Addams Student List

yyyyMMdd-HHmss

×

▼

File name will be "Addams Student List_yyyyMMdd-HHmss.pdf"

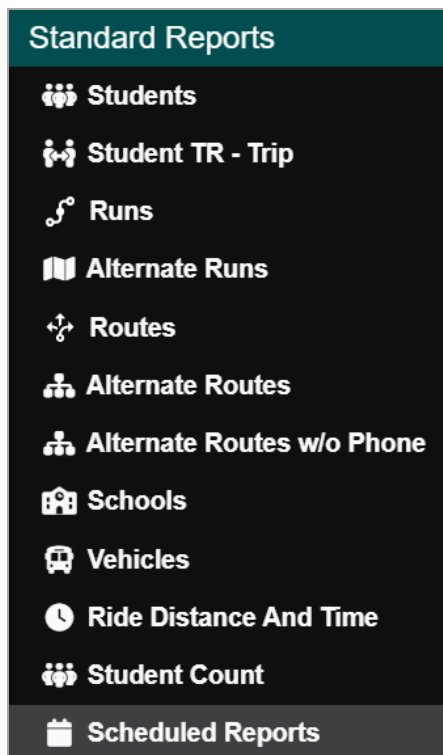
☐ Export Report To S3
 ☐ Public

Cancel

Save

12. Scheduled Reports

To view your scheduled reports, navigate to the Action Bar and select the Scheduled Reports module under Standard Reports.



The Scheduled Reports Module will open.

Routing » Reporting » Scheduled Reports

User Survey

Active Data Area: plan

Report List

PDF

CSV

Report Type	Format Report Name	Schedule
Route	configuration_name_datetime	<div></div>
Run	configuration_name_datetime	<div></div>
School	configuration_name_datetime	<div></div>
Student	configuration_name_datetime	<div></div>
Student TR	configuration_name_datetime	<div></div>

Scheduled Reports

View Reports Queue

Reload

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		<div></div>	<div></div>

Report Files

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	<div></div>
Unassigned Student TR List.csv	Student TR Trip	Completed	Scheduled	03/10/2025, 04:30 PM	03/10/2025, 04:30 PM	Andrea Brunson		<div></div>
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	<div></div>
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	<div></div>
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	<div></div>
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	<div></div>
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	<div></div>
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		<div></div>
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		<div></div>
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		<div></div>

12 Records | 2 Pages

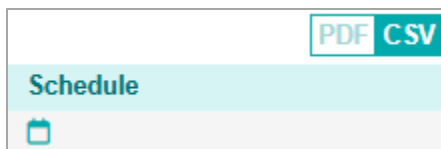
1

2

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. But 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 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	
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	RunStonStru TEST	Scheduled	Daily	Pending	02/12/2025, 02:22 ...		02/12/2025, 02:22 ...	David Goldthorn	dgoldthorn@edus...	plan	

16 Results | 1 Page

Records per page (20)

Close

- **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 Ti...	Creation Time	User Name	Uploaded S3	Message	
test.csv	Standard Student TR Trip	Completed	Scheduled	06/02/2025, 05...	06/02/2025, 05...	Jordon Fair...	X		

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:

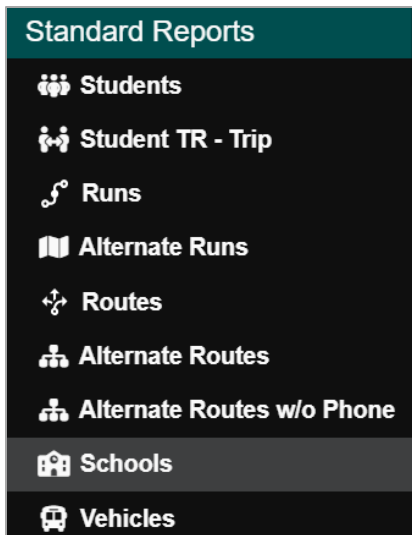
- Generate Schools Report
- Generate Run Report
- Schedule a CSV Student Trip Report

Generate Schools Report

Here's How

Once logged into Routing Management, go to the Schools module within Standard Reports.

1. Schools Report



2. Schools Search Tray

The Search Tray will appear. Leave the Name field blank. Enter School name in the 'Select or name new search' field to save the search, then select Search to search for all schools.

A "Search" interface with a light blue background. At the top is a search bar containing the text "Addams" and a teal button with a plus icon and the word "Filters". Below this is a teal header labeled "Name" with a double-headed arrow and a close icon. Under the header is a white input field with an upload icon and a delete icon. At the bottom left is a checked checkbox labeled "Save Changes". At the bottom right is a teal button with a magnifying glass icon and the word "Search", followed by a dropdown arrow.

3. Data Selection

Select your data from the data panel.

95 Results	Columns					5 Pages
Address	City	Created	Created By	Grades	Last M	
1715 S GLEN...		5/13/25, 3:31 PM	cemlen@edulo...	01, 02, 03, 0...	5/13/	
18 BABIAK LN		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	1/27/	
2500 S COLL...		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	5/27/	
1075 E OBER...		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	5/20/	
THIS IS MY PT		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	1/23/	
100 LEE SCH...		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	4/3/2	
100 DUBOIS ...		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	7/16/	
1700 KNIGHT...		6/3/25, 4:30 PM	cschuller@edul...		6/3/2	
ENOS ES		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	5/8/2	
FARIVIEW EL...		9/26/23, 10:03 PM	UNKNOWN	01, 02, 03, 0...	3/10/	
2001 S ALICE		9/26/23, 10:03 PM	UNKNOWN	05, 06, 07, 0...	1/22/	

4. Schools Configuration

Go to the Configure Report card and select your configuration.

Scheduled

Portrait

.pdf

School Address List

Show 1st column

Repeat header(s)

	Field Order	Sort Order	Max length	Page	Header label
Created By					
Email					
Last Modified					
Last Modified By					
Latitude					
Level					
Longitude					
Mailing Address					
Phone Number					
School District					
State					

Remove All

School Code

1

12

Header label

Name

2

12

Header label

Address

3

12

Header label

Grades

4

12

Header label

Programs

5

12

Header label

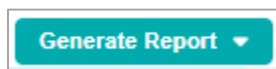
As you add and remove fields, the Preview will update accordingly.

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 within the ‘Preview’ card.



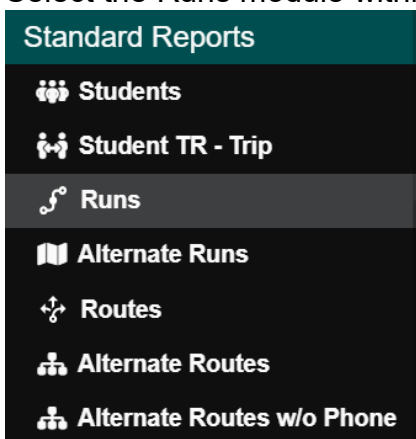
Then select With Filter(s) Condition.

- ☐ **Export Report To S3**
 - With Selected Data
 - With Filter(s) Condition

Generate Run Report

1. Runs Report


Select the Runs module within Standard Reports.





2. Runs Search Tray




The Search Tray will appear. Enter your Run ID. If you leave the search tray blank, all runs will appear in the Data Panel.


Search


 **Filters**

Run ID



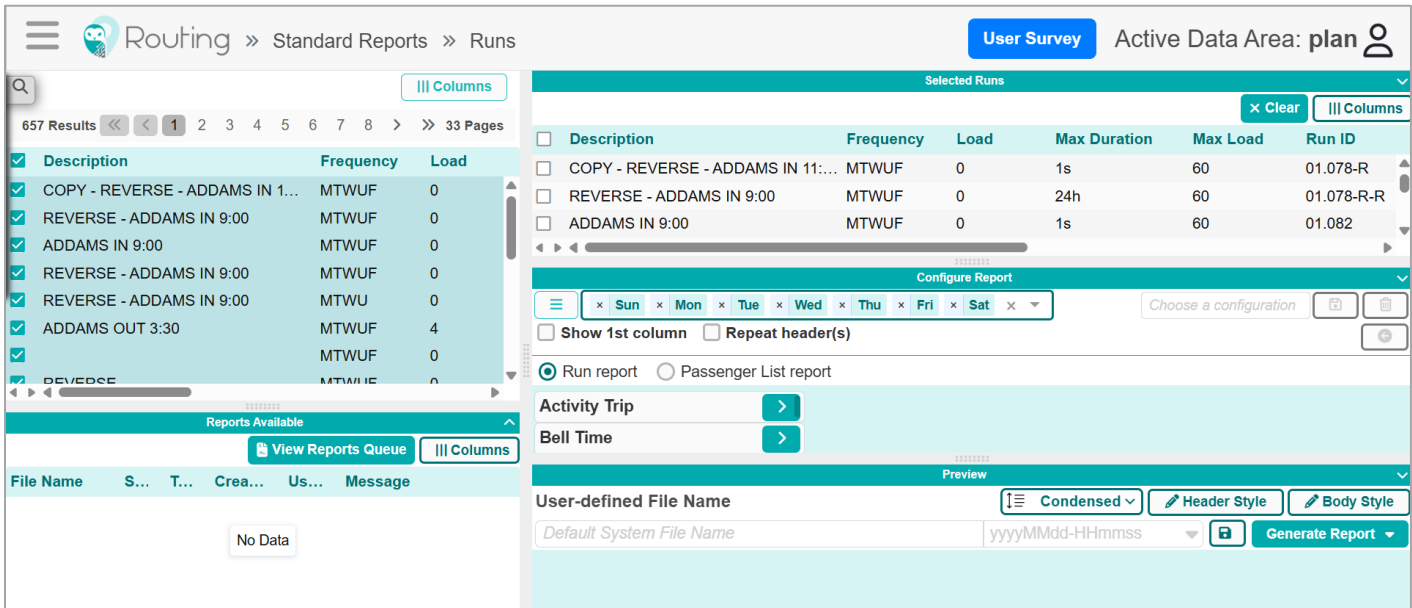


 **Search**



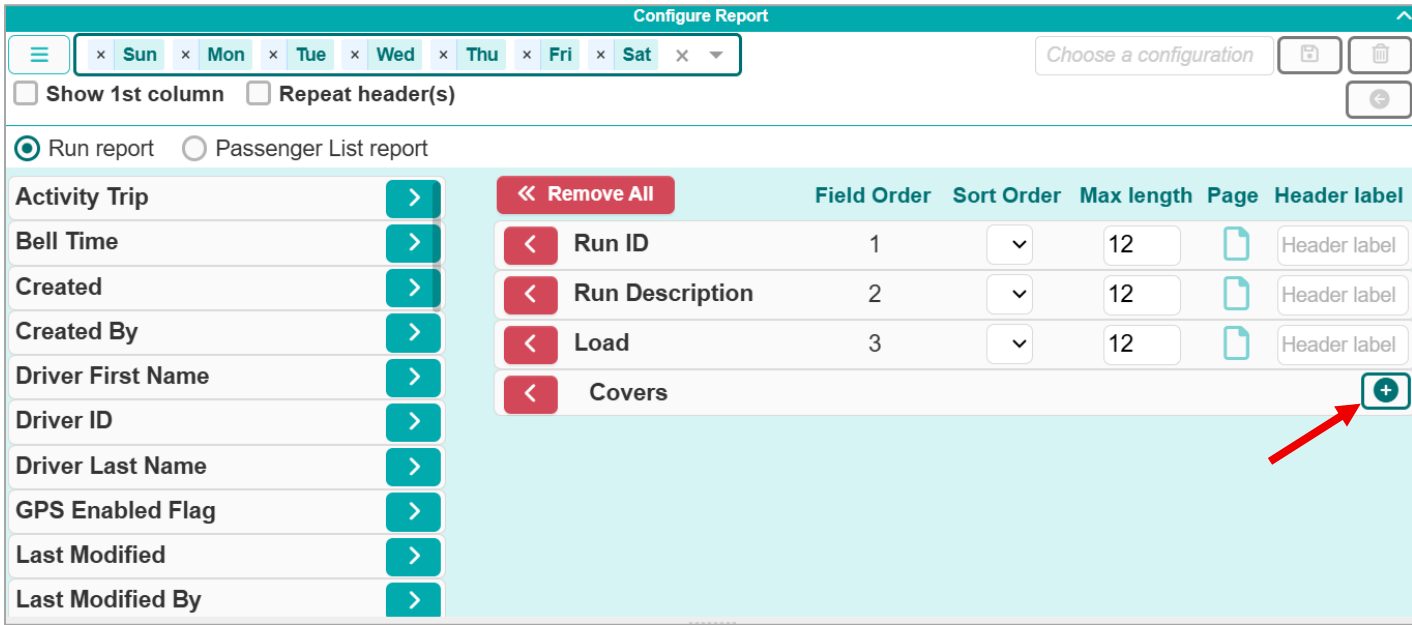
3. Data Panel

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 Configure Report card, 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.



A preview of the report will be shown in the Preview card.

Run Report		
Run ID	Run Description	Load
40.010	40.010 Description	1

6. **Generate Report**

Click on the Generate Report button and make a selection.



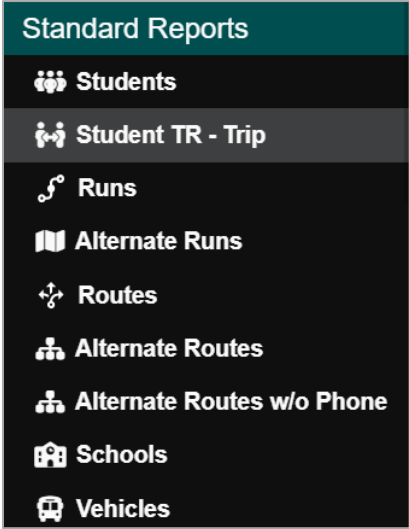
Schedule a CSV Student Trip Report

You would like to create a report that identifies any unassigned students within the system, as well as their stop type, level, and vehicle information. You would like that report to export automatically every Monday and Friday for the remainder of the school year.

Here’s How

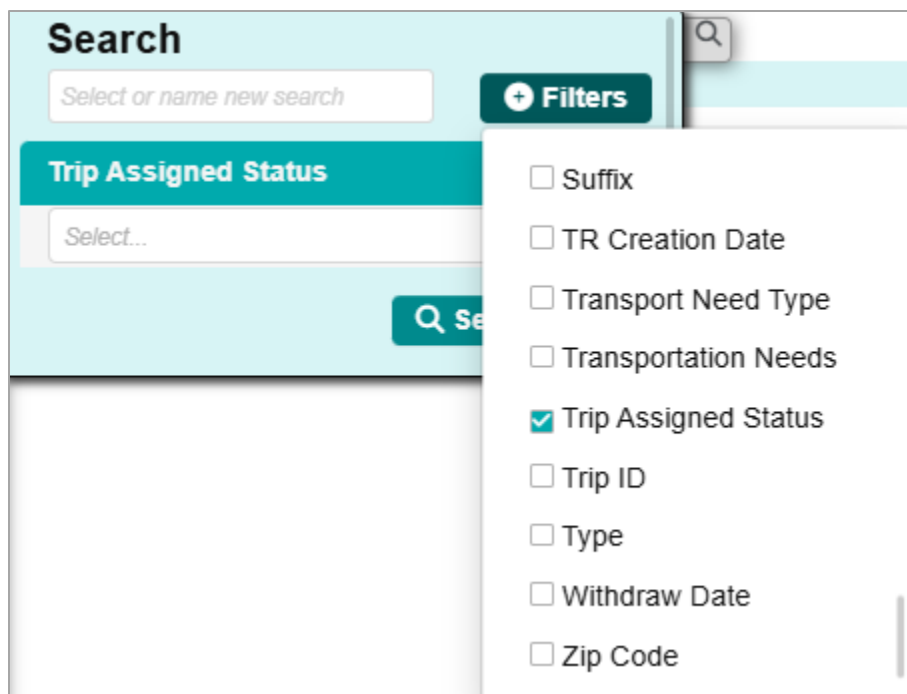
1. **Student TR – Trip Report**

Select Student TR – Trip within Standard Reports.

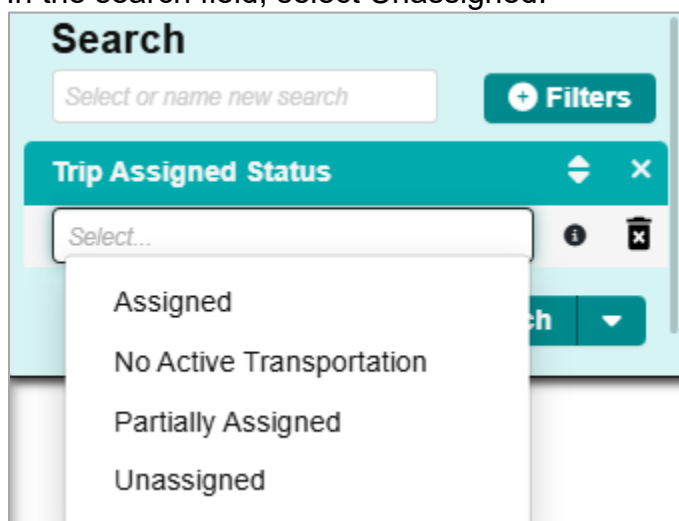


2. **Student TR Trip Search Tray**

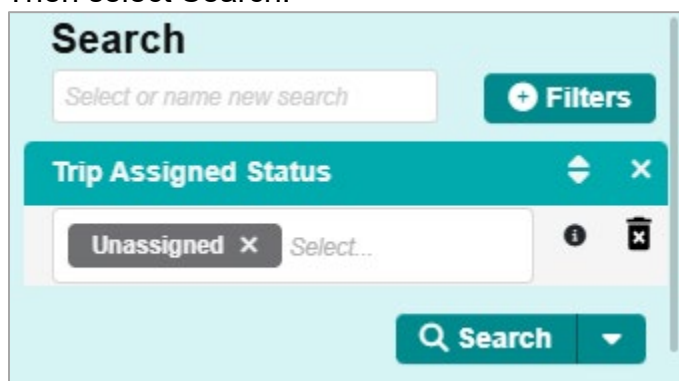
Search using the Trip Assignment Status filter.



In the search field, select Unassigned.

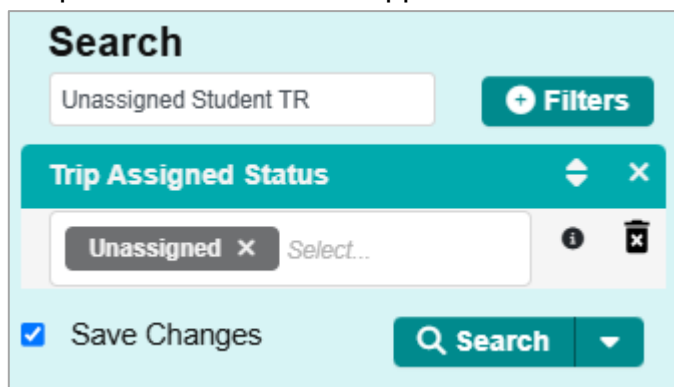


Then select Search.



- **Save Filter Template in the Search Tray**

In the Search Tray, save the search parameters as a template by entering the name for the template within the blank upper field. Then select search.



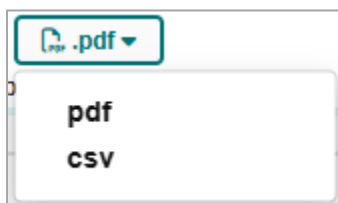
The search tray then updates with an additional 'Save Changes' button.

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.) Select this button and set to PDF.



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
Right Side Pickup	>	<< Remove All				
SIS Address	>	< First Name	1	12		Header label
Special Needs	>	< Last Name	2	12		Header label
SPED/IEP	>	< School	3	12		Header label
Suffix	>	< Grade	4	12		Header label
Withdraw Date	>	< Eligibility	5	12		Header label
TR Daily	+	< Trip Daily				
TR Records	+					
Trip Records	+					
UDFs	+					

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

d Reports >> Student TR - Trip

Selected Student TR - Trip

Configure Report

☒ Scheduled ☐ Portrait ☐ .pdf Choose a configuration

☐ Show 1st column ☐ Repeat header(s)

			Field Order	Max length	Header label
Address	>	<< Remove All			
Created	>	< First Name			
Created By	>	< Last Name			
Date Of Birth	>	< School			
District ID	>	< Grade			
Edulog ID	>	< Eligibility			
Email	>	< Trip Daily			
Enrollment Date	>				
Exclusive Stop	>				
Gender	>				

Trip Daily

	Field Order	Max length	Header label
<input checked="" type="checkbox"/> Date	1	12	
<input checked="" type="checkbox"/> Frequency	2	12	
<input checked="" type="checkbox"/> Trip Type	3	12	
<input checked="" type="checkbox"/> Status	4	12	
<input checked="" type="checkbox"/> Stop Type	5	12	
<input checked="" type="checkbox"/> Stop Level	6	12	
<input checked="" type="checkbox"/> Vehicle	7	12	
<input type="checkbox"/> Vehicle Size			
<input type="checkbox"/> Destination Description			
<input type="checkbox"/> Destination Location			

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

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 *
02/03/2025

Scheduled Time *
04:30 PM

End Date
06/27/2025

Day(s) of the Week *
Monday Friday

Filter Condition *
Unassigned Student TR

Configure Report *
Student List

User Defined Filename
Unassigned Student TR List yyyyMMdd-HHmssSSS

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

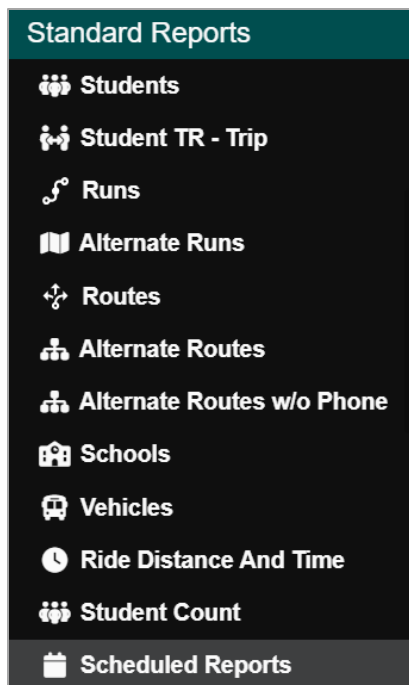
☐ Export Report To S3

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.
- Select Save.

5. Verify the Scheduled Report

Open the Action Bar and select the Scheduled Reports module under Standard Reports.



The report is now scheduled and can be verified in Scheduled Reports card.

Routing » Reporting » Scheduled Reports

Active Data Area: plan

Report List

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"/>

Scheduled Reports

View Reports Queue

Refresh

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	