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EDULOG

## ATHENA ROUTING & PLANNING

Student Import & Address Matching Training  
Resource Guide



# Student Import & Address Matching Training Resource Guide

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STUDENT IMPORT & ADDRESS MATCHING TRAINING RESOURCE GUIDE

## PURPOSE OF THIS GUIDE

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The Student Import & Address Matching Resource Guide will provide you with explanations of the basic tools within Athena, walk you through the procedure of uploading student information using a csv file, 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.





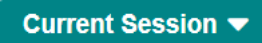

## ATHENA STUDENT IMPORT & ADDRESS MATCHING INTRODUCTION

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The Student Import Module can be found in the Utilities area of the action bar. In this module you will be able to upload student information from a csv file within Athena, making the process of uploading bulk student files a more convenient and efficient process. Once the information is uploaded, a student record will be created for each student, allowing for address matching, and later processes such as trip planning, to take place.

## ATHENA STUDENT IMPORT ASSET KEY

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Symbol	Explanation	Symbol	Explanation
 Show All Data	All Students will display despite status	 Initialize	Begin Import
 Columns	Categories for Sorting Data	 Cancel	Stop File Upload
 Current Session ▼	Import Record History	 Save	Finalize Report

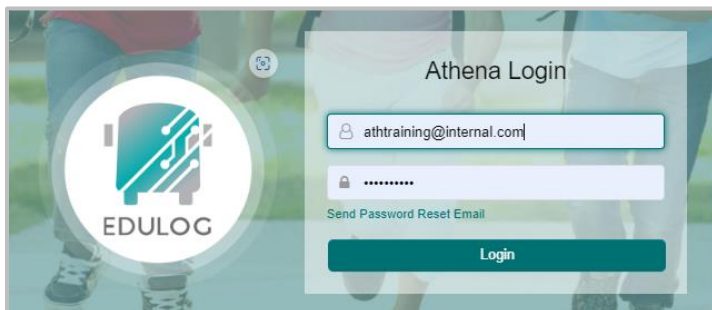
## NAVIGATING THE STUDENT IMPORT MODULE

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### Student Import:

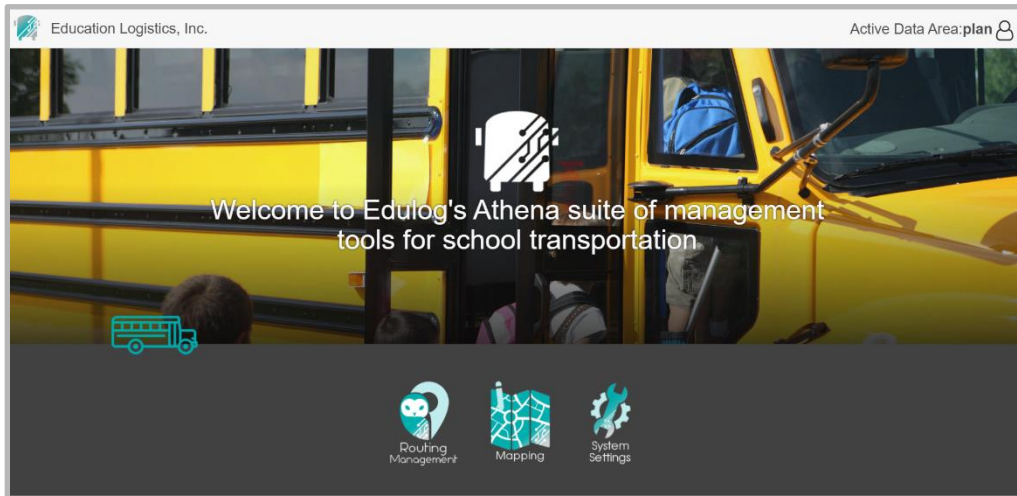
#### 1. Sign In:

You will first come to the Sign In page. Where you will enter your Username (email) and Password.



## 2. Athena Portal Home Page:

You can choose to select all students by clicking on the box in the heading, located in the upper left of the data panel.



## 3. Applications:

At the bottom of this screen are Athena applications.



## 4. Routing Management:

Click on the owl icon to enter the Routing Management module.



## 5. Utilities:

In the Action Bar, select Student Import under Utilities.



## 6. Import Students:

The Student Import window will open.

Routing > Utilities > Student Import

Active Data Area: plan

NorthwesternOntario-ASTUDENTDI-2023-07-07-100000.csv

Functions Current Session

Student Importation Student Deletion

Show All Data

Operation	Status	Ignore Import	Geolocation	Scho...	First Name	Last Name	Suffix	School	Grade
<input type="checkbox"/> ADD	Validation Failed	true	Unmatched	OK				BBS	12
<input type="checkbox"/> ADD	Validation Failed	false	Unmatched	OK				BBS	10

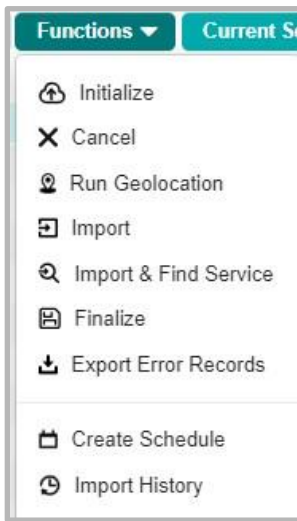
## 7. Uploaded File:

The file that was recently uploaded will show at the top left of the module.

NorthwesternOntario-ASTUDENTDI-2023-07-07-100000.csv

## 8. Functions:

At the top of the Data Panel, there is a Functions drop down with several options.

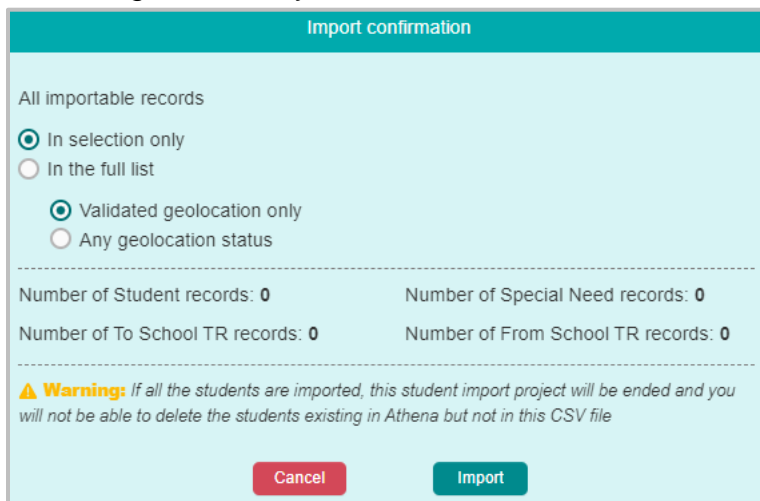


- **Initialize:** Once your file is uploaded, choose “Interactive Mode” before selecting “Go”.

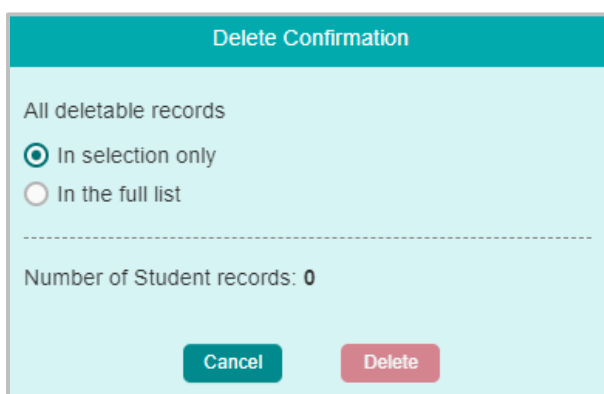


- **Cancel:** When selecting “Cancel”, this will interrupt and stop the file upload.

- **Run Geolocation:** When selecting this option, you will have the ability to execute geolocation on a selection of records (only unvalidated records are processed). The selection is made in the data panel—the Location Picker is not needed for this.
- **Import:** After you have matched all the addresses and fixed SGP, select “Import” to save the changes to the system.



- **Import and Find Service:** This will import students and try to assign them to a stop service. This is recommended if you already have your routing in place.
- **Delete:** When working within the “Student Deletion” tab, the delete button allows you to permanently delete records that are flagged in the status as “Suggested Deletion”. The user has the option to delete only records that are selected, or to delete the entire list within the “Student Deletion” tab.



- **Export Error Records:** This will create an Export Error Records CSV file to be downloaded.
- **Create Schedule:** User’s can work with their Athena Service Level Manager (SLM) to set up their Automated Student Data Import (ASDI). ASDI will automatically pull a student import file following your desired schedule—whether that be a daily, weekly, or bi-weekly import.



**8.1 Import History:** Within the Import History, the user is not only able to see the day and time of all imports within Athena, but the client is able to re-download the five most recent student import files that were pulled into the system.

<input type="checkbox"/>	User ...	Date	Status	Progress	Import ...	San...	Importa...	Im...
	uat02...	11/09/20...	Interrupt...		Manual I...	plan		
	uat02...	11/09/20...	Canceled		Manual I...	plan		↓
	uat02...	11/08/20...	Canceled		Manual I...	plan		↓
	uat02...	11/08/20...	Canceled		Manual I...	plan		↓
	athtra...	10/26/20...	Invalid F...		Manual I...	plan		
	athtra...	10/26/20...	Canceled		Manual I...	plan		↓
	athtra...	10/26/20...	Invalid F...		Manual I...	plan		
	athtra...	10/20/20...	Canceled		Manual I...	plan		↓
	athtra...	10/20/20...	Canceled	5902/5902 (100%)	Manual I...	plan		
	uat02...	09/26/20...	Canceled	5902/5902 (100%)	Manual I...	plan		
	athtra...	09/25/20...	Completed	5019/5902 (85%)	Manual I...	plan		

135 Records | 3 Pages      « « 1 2 3 » »      Records per page (50)

**8.1.1 Cancel Accumulated Imports:**

User's who are using ASDI, and encounter an accumulation of unaddressed import files following a hiatus from the system can cancel all but the most recent imported file to avoid having to manually cancel file's one at a time.

Select cancel files, to cancel all files but the most recent import.

<input type="checkbox"/>	User ...	Date	Status	Progress	Import ...	San...	Importa...	Im...
	uat0...	11/09/20...	Interrupt...		Manual ...	plan		
	uat0...	11/09/20...	Canceled		Manual ...	plan		↓
	uat0...	11/08/20...	Canceled		Manual ...	plan		↓
	uat0...	11/08/20...	Canceled		Manual ...	plan		↓

**9. Current Sessions:** Within the Current Session drop down menu, you are able to view the Number of Records and Records Processed from the Student Import.

Current Session ▼		Columns
<b>Number of records</b>		
Loaded	2410	
New records	2	
Changed records	1960	
Existing records	448	
Deleted records	N/A	
No-Ride	0	
<b>Records processed</b>		
Validated	2311	
Not validated	99	
Imported	0	
Import failed	0	
Unmatched	96	
SGP errors	3	

## 10. Data Panel:

When entering the Student Import Module the user will be brought to the Data Panel which will automatically show all records that failed due to a geolocation or SGP (School, Grade, and Program) error. To view all records from the Student Import, toggle on the “Show All Data” tool.

### 10.1 Show All Data:

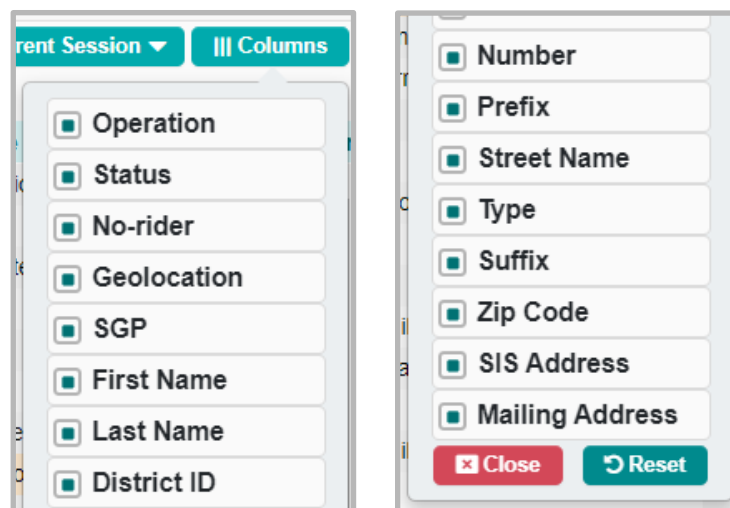
When you select the Show All Data side button, all students will display below regardless of status.

Show All Data							
<input type="checkbox"/>	Operation	Status	No-rider	Geolocation	SGP ↑	First Name	Last Name
<input type="checkbox"/>	ADD	Failed Validation	true	● OK	● Fail	Kaydence	Parsons
<input type="checkbox"/>	UPDATE	Failed Validation	false	● Unchanged	● Fail	McKenna	Booth
<input type="checkbox"/>	ADD	Failed Validation	false	● OK	● Fail	Aura	Myers
<input type="checkbox"/>	UPDATE	Validated	false	● Unchanged	● OK	Skyler	Haight
<input type="checkbox"/>	UPDATE	Validated	true	● Unchanged	● OK	Joshua	Prine
<input type="checkbox"/>	EXIST	Validated	true	● Unchanged	● OK	Nathaniel	Sablan
<input type="checkbox"/>	UPDATE	Validated	true	● Unchanged	● OK	William	Pilling
<input type="checkbox"/>	EXIST	Validated	true	● Unchanged	● OK	Zaden	Baxter

### 10.2 Columns:

There are several columns of information that will be listed in the Data Panel. To add or hide columns in the Data Panel, click on the Columns button in the upper right of the Data Panel.





**10.3** Deselect the columns you want to hide. Select the columns you want to view.

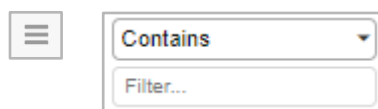
**10.4** You can drag and drop the categories within the Columns window to change the order, as well as move the categories within the Data Panel to reflect your desired order.

Geolocation	SGP	First Name	Last Name	Street Name
Unmatched	OK			TERRITORIAL
Unmatched	OK			ERIC TODD
Unmatched	OK			DOUGLAS
Unmatched	OK			DOUGLAS
Unmatched	OK			MARTIN CREEK

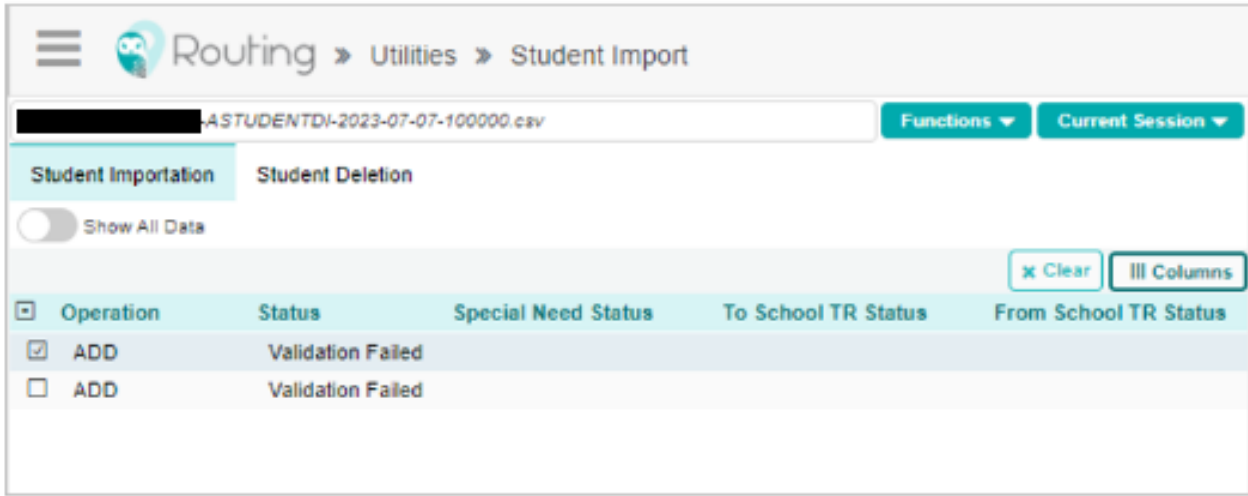
**10.5** You have the ability to sort your columns. For example, to sort by last name, click on the heading of the column and it will sort ascending, click again to sort by descending.

**10.6 Data Filter:**

There is a Data Filter for some columns; click on the menu icon next to the column name, then select only the data you want to view. In some cases, you can type in the data you wish to filter.



**11.** Once the file has completed its upload, the data listed in the Data Panel following the upload will display students who either have a Geolocation or SGP error.

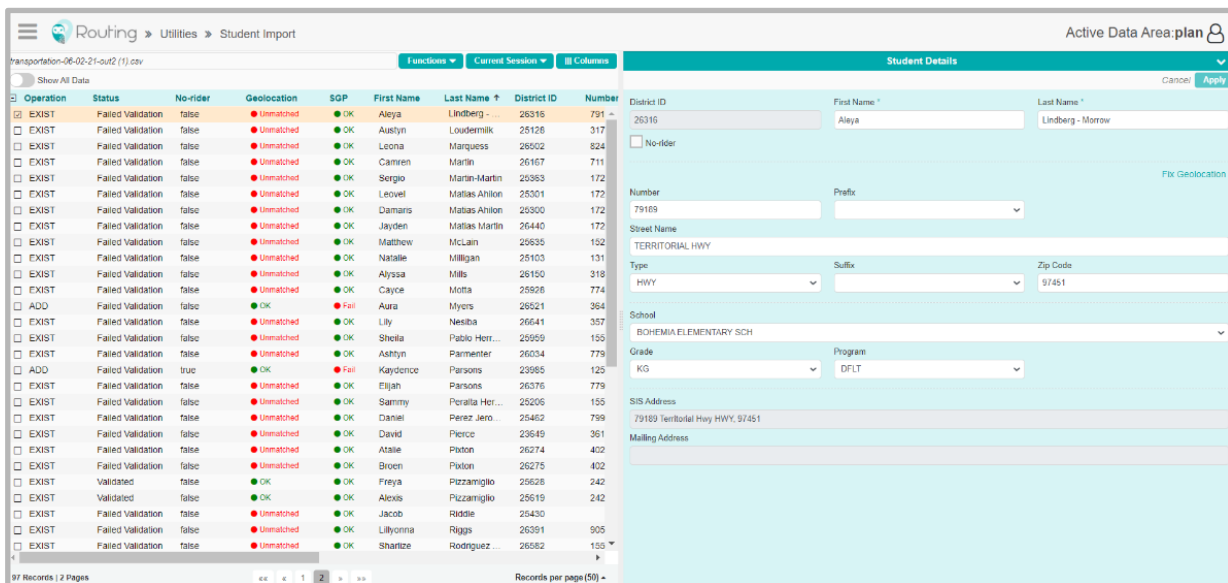


- a) **Geolocation:** All identified Geolocation errors will require additional “Address Matching” using the “Pick a Location” window.
- b) **SGP:** SGP or School, Grade, and Program errors are usually rectified within the Schools module of Athena.

Status	Geolocation	SGP
Failed Validation	● Unmatched	● OK
Failed Validation	● Unmatched	● OK
Failed Validation	● Unmatched	● OK

## 12. Select a Student:

When selecting a student in the Data Panel, you will see the student highlight yellow in the Data Panel, and the student information in the Workspace Panel under “Student Details”.



## 12.1 Select Multiple Students:

You can select several students at the same time; they will be listed under “Selected Students” in the Workspace Panel.

The screenshot shows the Routing application interface. At the top, there's a navigation bar with 'Routing' and 'Utilities > Student Import'. Below that, a table lists various student records with columns for Operation, Status, No-rider, Geolocation, SGP, First Name, Last Name, District ID, and Number. Several rows are highlighted in orange, indicating they are selected. To the right, a 'Selected Students' panel is open, showing a list of the selected students with columns for No-rider, First Name, Last Name, Number, Prefix, Street Name, Type, Suffix, and Zip Code. Below this, a 'Student Details' panel is visible, showing fields for District ID, First Name, and Last Name, with values populated for the selected student (Ivy Anderson).

## 12.2 Selected Students Card:

When selecting one student in the “Selected Student” card, the details for that student will be listed below.

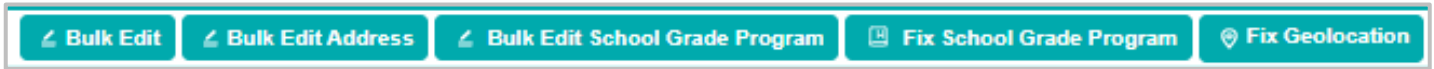
The screenshot shows a 'Selected Students' card in the application. The card has a title bar and a list of students with columns for No-rider, First Name, Last Name, Number, Prefix, Street Name, Type, Suffix, and Zip Code. The student Ivy Anderson is selected. Below the list, a 'Student Details' panel is open, showing fields for District ID, First Name, and Last Name, with values populated for the selected student (Ivy Anderson).

## 12.3 Bulk Student Update:

You can update multiple student records in a single action by selecting multiple students in the “Selected Student” card.

The screenshot shows a 'Selected Students' card with a list of students. The card has a title bar and a list of students with columns for No-rider, Rider Type, Ignore Import, First Name, Last Name, Number, Prefix, and Street Name. The student Ivy Anderson is selected. The card also has a 'Bulk Edit' button and a 'Bulk Edit Address' button. Below the list, a 'Student Details' panel is open, showing fields for District ID, First Name, and Last Name, with values populated for the selected student (Ivy Anderson).

There are several different options for Bulk Update:



➤ **Bulk Edit:**

A form titled "Bulk Edit" with a teal header. It contains two dropdown menus: "No-rider" and "Ignore Import". At the bottom, there are two buttons: "Save" (teal) and "Cancel" (red).

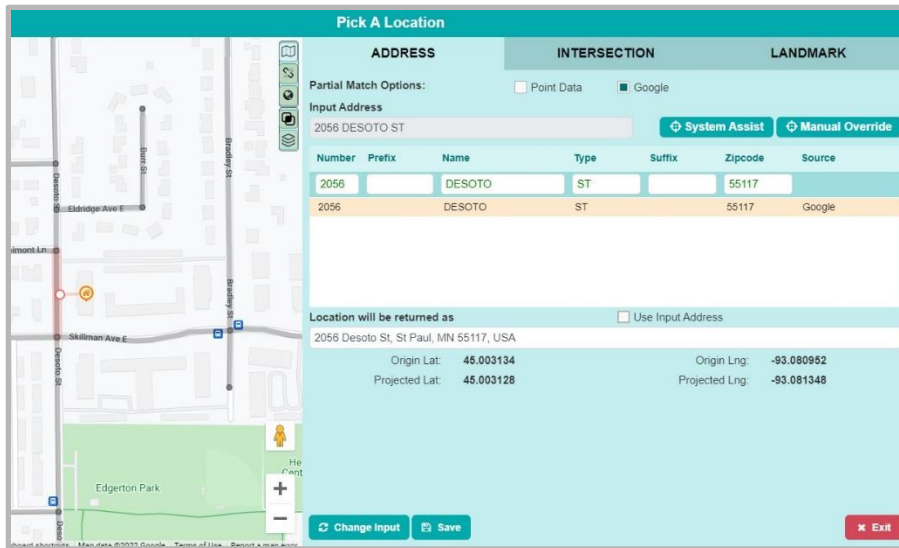
➤ **Bulk Edit Address:**

A form titled "Bulk Edit Address" with a teal header and a close button (red square with 'x'). It contains several input fields: "Number" (text), "Prefix" (dropdown), "Street Name" (text), "Type" (dropdown), "Suffix" (dropdown), and "Zip Code" (text). At the bottom, there are two buttons: "Save" (teal) and "Cancel" (red).

➤ **Bulk Edit SGP & Fix SGP:**

A form titled "Select school information" with a teal header and a close button (red square with 'x'). It contains three dropdown menus: "School", "Grade", and "Program". At the bottom, there are two buttons: "Save" (teal) and "Cancel" (red).

➤ **Bulk Fix Geolocation:**



### 13. Student Details Card:

When selecting a student in the Data Panel, the Student Details will display in the Workspace Panel.

**Student Details** Cancel Apply

District ID: a278376061

First Name: [REDACTED] Last Name: [REDACTED]

No-Rider  Ignore Import

Rider Type: [REDACTED]

Suffix: [REDACTED]

Number: 15 Prefix: [REDACTED]

Street Name: [REDACTED]

Type: [REDACTED] Suffix: [REDACTED] Zip Code: PGN 014 Fix Geolocation

School: [REDACTED]

Grade: 12 Program: DFLT

SIS Address: [REDACTED]

City: [REDACTED] State: [REDACTED] Country: [REDACTED] Zip: PGN 014

Mailing Address: [REDACTED]

User-Defined Fields ↑

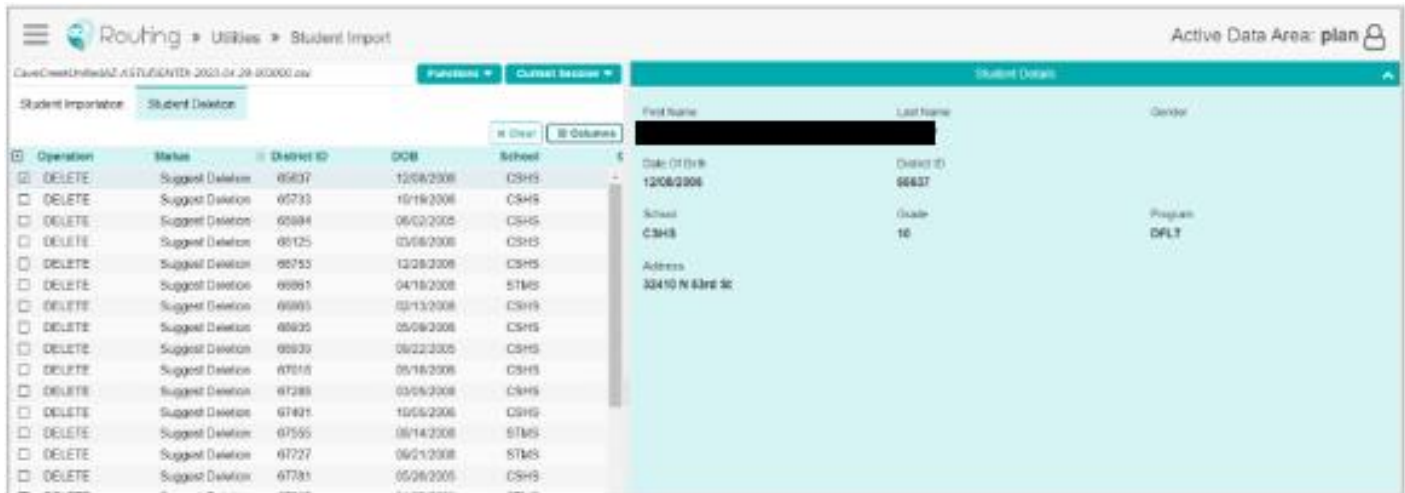
unit\_num: [REDACTED] Contact\_Relation: MOTHER

- **District ID:** This will come from the SIS file; this cannot be edited.
- **First & Last Name:** A required field.
- **No-Rider:** If a student is set in the input file as a non-rider, there is no need to check for validation (SGP or Geolocation). The record can be imported in its current state with the No-Rider flag.
- **Ignore Import:** By flagging a student as ignore import, it will remain in the student import module even when you eventually finalize the file to be pulled into the system.
- **Address:** These fields are auto filled from the SIS file, and can be changed by selecting the “Fix Geolocation” link.
- **Fix Geolocation:** Selecting this link will open the Location Picker window.
- **SGP:** The School, Grade and Program can be edited.
- **SIS Address:** The SIS Address field cannot be edited.
- **Mailing Address:** The Mailing Address field cannot be edited.



## Student Deletion Tab:

The “Student Deletion” tab houses all data that is found to be potentially outdated following the upload of a student file, these students will be labeled as “Suggest Deletion” to be reviewed before being fully “deleted”.



The screenshot shows the 'Student Import' utility in the 'Routing' system. The 'Student Deletion' tab is active, displaying a table of students with the status 'Suggest Deletion'. The table columns include Operation, Status, District ID, DOB, and School. A details pane on the right shows information for a selected student, including Date of Birth, District ID, School, Grade, Program, and Address.

Operation	Status	District ID	DOB	School
DELETE	Suggest Deletion	06037	12/08/2006	CSHS
DELETE	Suggest Deletion	05733	10/19/2006	CSHS
DELETE	Suggest Deletion	05894	06/02/2005	CSHS
DELETE	Suggest Deletion	06125	02/08/2006	CSHS
DELETE	Suggest Deletion	06753	12/08/2006	CSHS
DELETE	Suggest Deletion	06961	04/18/2008	STMS
DELETE	Suggest Deletion	06993	02/13/2006	CSHS
DELETE	Suggest Deletion	06820	05/08/2006	CSHS
DELETE	Suggest Deletion	06930	06/22/2005	CSHS
DELETE	Suggest Deletion	07010	05/18/2006	CSHS
DELETE	Suggest Deletion	07288	03/04/2006	CSHS
DELETE	Suggest Deletion	07491	10/05/2006	CSHS
DELETE	Suggest Deletion	07555	08/14/2006	STMS
DELETE	Suggest Deletion	07727	06/21/2006	STMS
DELETE	Suggest Deletion	07781	05/06/2005	CSHS

Student Details:

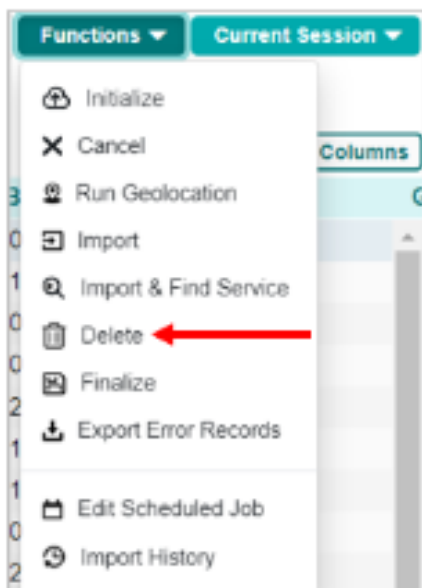
First Name: [REDACTED] Last Name: [REDACTED] Gender: [REDACTED]

Date of Birth: 12/08/2006 District ID: 06037

School: CSHS Grade: 10 Program: DFLT

Address: 32410 N 84th St

The finalized “deletion” button is housed within the functions drop down.



Once the “Delete” button is selected in the “Functions” drop down, the status will change from “Suggest Deletion” to “Delete Pending”.

Operation	Status	District ID	First Name	Last Name	DOB	Gender	School	Grade	Program	Address
DELETE	Deleted	MTR001	MTR001	Nguyen	05/11/2008		SEJ	JK	DPLT	
DELETE	Deleted	MTR008	MTR008	Nguyen	12/14/2007		SEJ	JK	DPLT	
DELETE	Deleted	MTR004	MTR004	Nguyen	12/11/2007		SEJ	JK	DPLT	
DELETE	Deleted	MTR020	MTR020	Nguyen	12/05/2007		SEJ	JK	DPLT	
DELETE	Deleted	MTR011	MTR011	Nguyen	12/22/2007		SEJ	JK	DPLT	
DELETE	Deleted	MTR012	MTR012	Nguyen	09/11/2008		SEJ	JK	DPLT	
DELETE	Deleted	MTR003	MTR003	Nguyen	11/28/2007		SEJ	JK	DPLT	
DELETE	Deleted	MTR014	MTR014	Nguyen	05/11/2008		CPE	CO	DPLT	
DELETE	Deleted	MTR015	MTR015	Nguyen	11/06/2007		SEJ	JK	DPLT	
DELETE	Deleted	MTR016	MTR016	Nguyen	11/03/2007		SEJ	JK	DPLT	
DELETE	Deleted	MTR017	MTR017	Nguyen	09/14/2008		SEJ	JK	DPLT	
DELETE	Deleted	200048580	NGO-GLAS	LENSAN	08/07/2008	M	CCC	CG	DPLT	
DELETE	Deleted	NW101	NW101 test	NG00	09/11/2008		SEJ	JK	DPLT	
DELETE	Deleted	NW140	NW140 test	NG08	05/07/2008		SEJ	JK	DPLT	
DELETE	Deleted	NW141	NW141 test	NG00	09/11/2008		SEJ	JK	DPLT	
DELETE	Deleted	NW150	NW150 test	NG08	05/07/2008		SEJ	JK	DPLT	
DELETE	Deleted	NW153	NW153 test	NG01	12/08/2008		SEJ	JK	DPLT	
DELETE	Deleted	NW156	NW156 test	NG04	12/03/2007		SEJ	JK	DPLT	
DELETE	Deleted	NW159	NW159 test	NG07	12/11/2007		SEJ	JK	DPLT	
DELETE	Deleted	NW162	NW162 test	NG10	12/03/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW165	NW165 test	NG12	11/26/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW166	NW166 test	NG14	11/20/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW168	NW168 test	NG16	11/14/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW170	NW170 test	NG18	11/08/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW172	NW172 test	NG20	11/02/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW169	NW169 test	NG17	11/11/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW171	NW171 test	NG19	11/05/2007		SEJ	JK	DPLT	
DELETE	Delete Pending	NW173	NW173 test	NG21	10/29/2007		SEJ	JK	DPLT	

Once the deletion has been finalized the status will change for the final time to “Deleted”.

## ATHENA 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. Within the Student Import module, users will spend a great deal of time address matching, and vetting out SGP errors. With that workflow in mind, the scenario that will be discussed is:

- Using Location Picker for Address Matching

### Using Location Picker for Address Matching

#### 1. Introduction:

In the “Pick a Location” window, given an input address did not match, the system will search for partial matches with available point data.

1.1. As the system tries to find partial matches, it will indicate the progress of it's work by the following color code for each of the 3 components above:

- a) **Red** = Component is wrong
- b) **Green** = Component is correct
- c) **Black** = Status unknown

1.2. The address is successfully matched when all 3 components (Name, Full Name, and Number) are green.

1.3. The system will look for the best address matches in the following order; Name, Full Name, and Number.

Number	Prefix	Name	Type	Suffix	Zipcode	Source
2056		DESOTO	ST		55117	
2056		DESOTO	ST		55117	Google

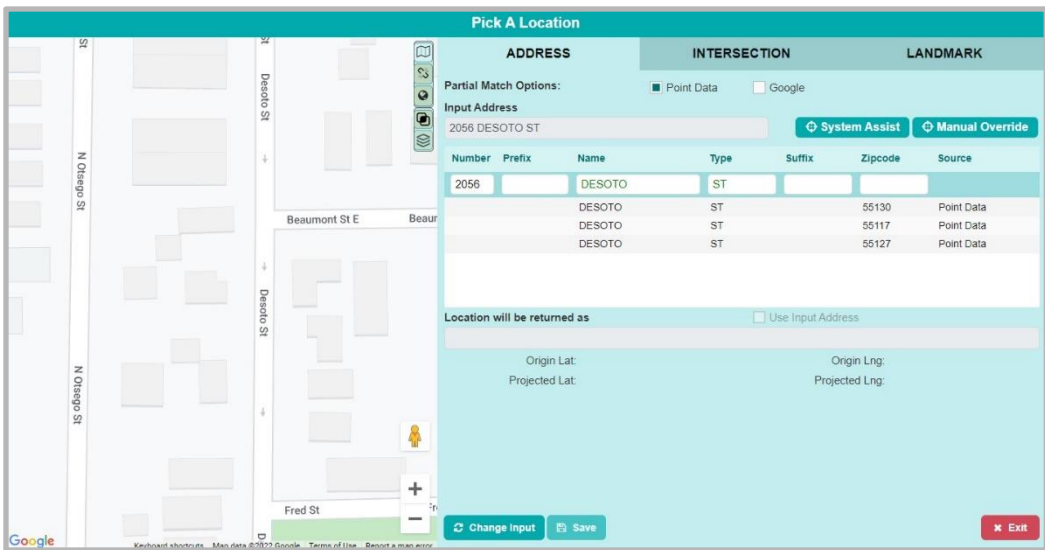
1.4. The system uses three sources to Address Match students. It is recommended to use the sources in the following order:

- a) **Point Date**: The map Edulog has built for the site.
- b) **Google**: Google Maps
- c) **System Assist & Manual Override**: Digitize location, creating your own point data.

## 2. Fix Geolocation:

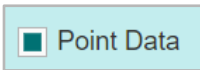
[Fix Geolocation](#)

When selecting Fix Geolocation in the Student Import screen, the Pick a Location window will open. Here is where you can match the addresses:

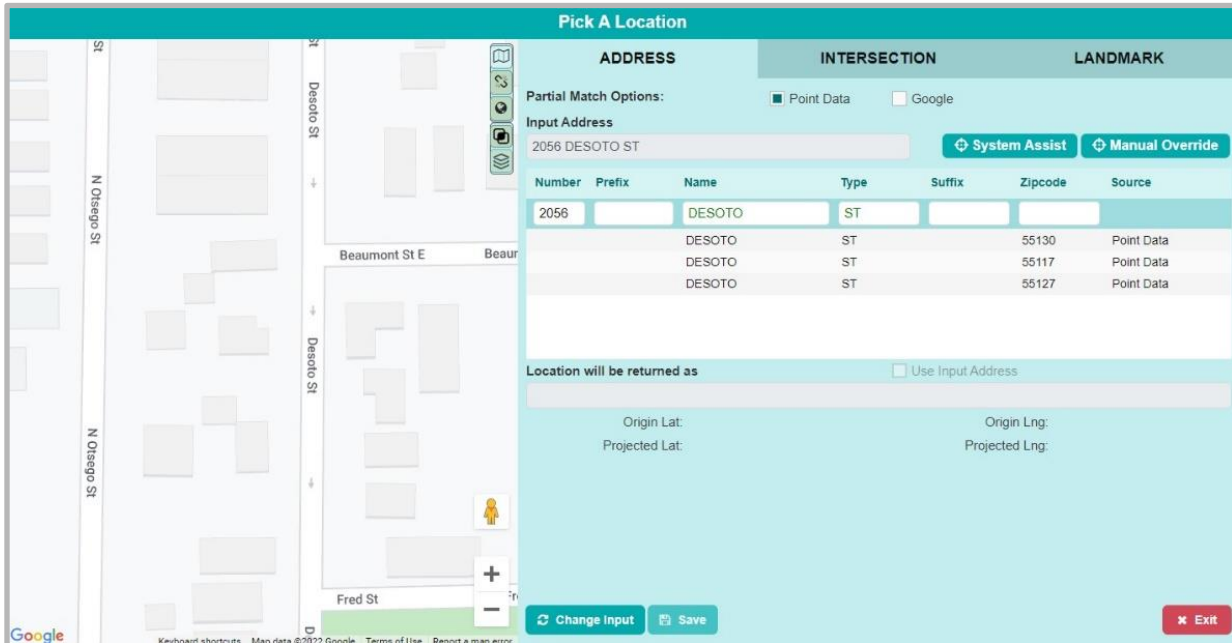


### 3. Point Data:

When entering the “Pick a Location” window, the Point Data radio button is selected and the closest address matches will be listed below.



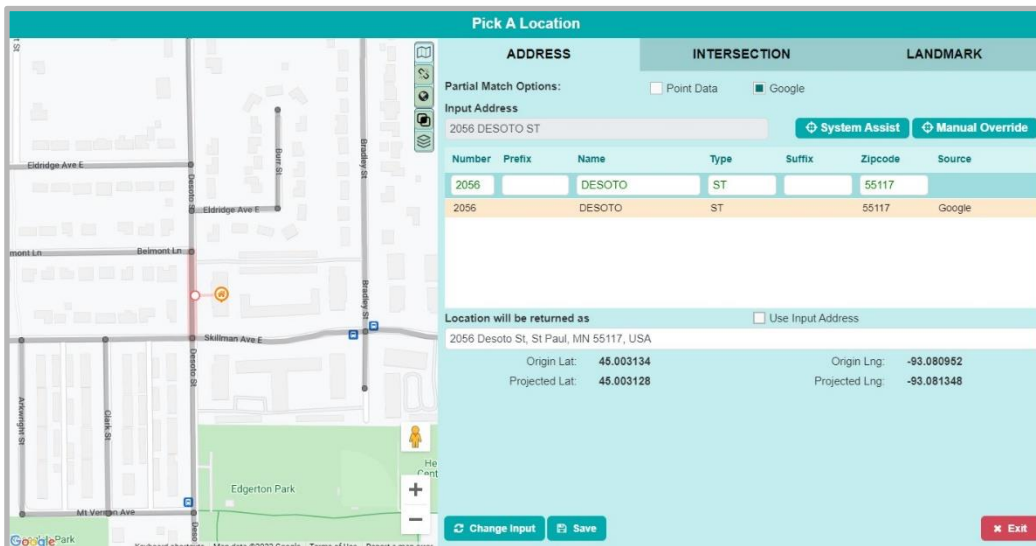
If none of those addresses are sufficient, select the Google button.



### 3.1. Google



When the Google radio button is selected and the Point Data radio button is deselected, the closest address matches will be listed. Search for, and select the closest best match:

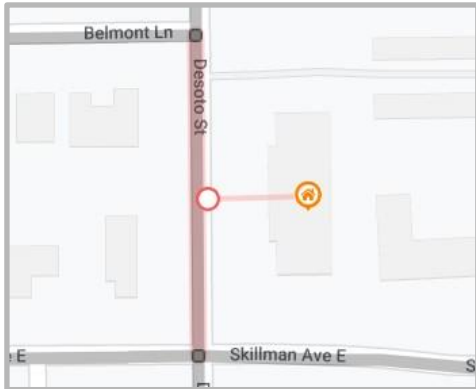


If there is not a good match, utilize the System Assist tool.

### 3.2. System Assist:



Click on the map at the desired location. A line will appear from the location you picked to the nearest street segment.

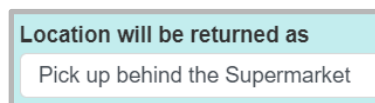


The address displayed in the 'Location will be returned as' box at the bottom of the window.



**3.2.1** When using the System Assist tool, it is recommended to use this field to make notes; for instance: Parking Lot Entrance, Behind the Restaurant, Gated Community Entrance.

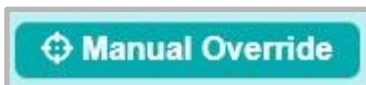
- These notes will assist the driver with directions.
- If the System Assist does not recognize the address using Point Data or Google, you put address location information in this box and it can be saved.



### 3.3. Manual Override:

If the address point doesn't populate, you can manually place the address point where you want it.

- For example, if you want to locate a school/stop, but the address is not in a convenient location for the bus to stop, you can use the manual override button to place the stop where you think is best, despite the address.

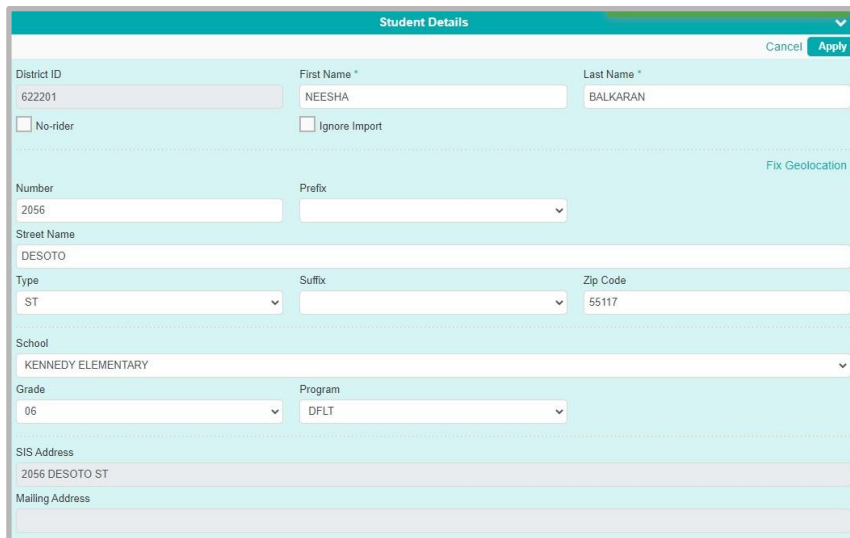
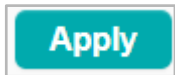


### 3.4. Save and Apply:

Once you have made your selection, click on the Save button at the bottom right of the Pick a Location window.



This will take you back to the Student Import screen; click apply in the upper right of the Student Details to finalize your changes/

A screenshot of the "Student Details" form. The form has a teal header with the title "Student Details" and a dropdown arrow. In the top right corner, there are "Cancel" and "Apply" buttons. The form contains several input fields: "District ID" (622201), "First Name \*" (NEESHA), "Last Name \*" (BALKARAN), "No-rider" checkbox, "Ignore Import" checkbox, "Number" (2056), "Prefix" dropdown, "Street Name" (DESOTO), "Type" dropdown (ST), "Suffix" dropdown, "Zip Code" (55117), "School" dropdown (KENNEDY ELEMENTARY), "Grade" dropdown (06), and "Program" dropdown (DFLT). At the bottom, there are "SIS Address" (2056 DESOTO ST) and "Mailing Address" fields. A "Fix Geolocation" link is visible on the right side of the form.

The changes will show in the Student's list in the Data Panel.

- Status will be "Validated"
- Geolocation will be "OK"

### 4. Fix School Grade Program:



When selecting "Fix SGP", the 'Select School Information' will populate. Here you can change the School, Grade, and Program. Select the appropriate information in the drop-down menus and click 'OK' to finalize.

**Select school information**

School

Leschi Secondary School ▼

Grade

06 ▼

Program

DFLT ▼

OK Cancel

**5. Import:**

To save your work, navigate to the “Functions” drop down and select ‘Import’.