

ATHENA ROUTING & PLANNING

Reporting Training Resource Guide



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REPORTING TRAINING RESOURCE GUIDE

PURPOSE OF THIS GUIDE

The Reporting Resource Guide will provide you with explanations of the basic 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, and Vehicles. 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.

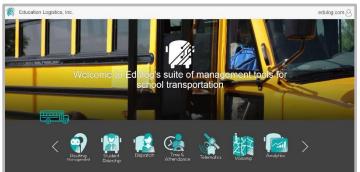
NAVIGATING REPORTING MODULES

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:



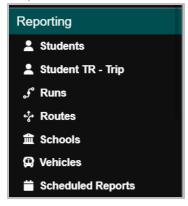
3. Routing Management:

In this guide we will go into Routing Management - click on the Athena Owl.



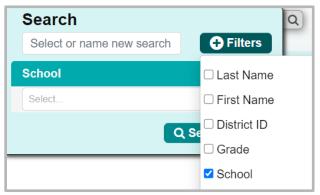
4. Select Report:

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



5. Reports Search Tray:

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



5.1. Enter the school's name in the search field or select the school in the drop down and then search.

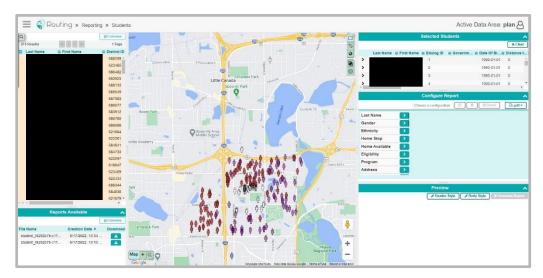


Once your search is completed, close the search tray using the tab.



6. Reports Data:

Students will be listed in the Data Panel, and when a student is selected, their location will display on the map, and their information will appear in the Workspace Panel.



7. Configure Report:

When selecting students in the Data Panel, their information can be pulled in the Configure Report section, where data options will be listed on the left.

Configure Report											
🔁 .pdf 🔻 🕒 Portrait 🔻	Show 1st column	Repeat header(s)	Choose a configuration								
Last Name	>										
Gender											
Ethnicity											
Home Stop											
Eligibility											
Program											
Address											

7.1. PDF Reports:

For PDF reports, users can choose between "Portrait" or "Landscape" printing format.

🕒 .pdf 🔻	Portrait - Shov
Gender	Portrait
Ethnicity	Landscape
Eligibility	·

For the fields you'd like to show on the report, select the "Add" button.



The configuration fields will display on the right, and you can also remove a field by selecting the "Remove" button.

Configure Report									
D.pdf 🔻 🕞 Portrait 🗸	Show 1st c	olumn 📃 Repea	Choose a configuration 🖺 📋 😋						
Gender	>	Remove All	Field Order	Sort Order	Max length Page Hea	der			
Ethnicity		Last Name	1	~	12 Heade	er label			
Eligibility		Home Stop	2	~	12 Heade	er label			
Program	>	_							
Address	>								
Suffix	>								
No-Rider	>								

You can also remove a field by selecting the "Remove" button.



7.2. Preview:

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 Panel", the Preview will update accordingly.

			Preview			
				🖋 Header S	Style 🚺 🖋 Body Styl	e 🔰 🕨 Generate report 🖄
Stude	nts Report					
Students :	First Name	Grade	Last Name	Address	School	
Students:	John	01	Doe	address	The school	

Note: The Preview is a sample report.

7.3. Explanation of Fields and Tools within Configure Report Panel:

	а	d	C	d	e
« Remove All	Field Order	Sort Order	Max length	Page	Header label
< Last Name	1	2 🗸	12	٥	Header label
First Name	2	~	12	0	Header label
< Address	3	~	12	0	Header label
Phone Number	4		12	0	Header labe
Grade	5	1~	12		Header labe

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 can increase or decrease the space between fields in the preview header, to either create more space between headings, or decrease the space to include more fields in the report.

Student:	Last Name	Ethnicity	Eligibility

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:

This is the header for each page break. You will see that change at the top left of the report.

		« R	temove All		Field Order	Sort Order	Max length	Page	Header label
Gender		> <	Last Name		1	1 -	12	•	Last
Home Stop		> <	Ethnicity		2	~	12		Header label
Program			Eligibility		3		12		Header label
Address									
			P	review					
					🖋 Heade	r Style 🥖	Body Style	 ► G	enerate Repor
	Stude	ent Report							
	Student:	Last Name	Ethnicity	Eligibility					
	Last:	Doe							
	Student:	Doe	Ethnicity	Eligible					

7.4. Save Configuration:

You can save a configuration by entering a name in the "Choose a Configuration Box".



Then enter a name for the configuration, and save. Once saved, you can search for the configuration in the box, delete it, or reset it.

Test 🗈 🗊 G Reset 🔁 .pdf 🗸

7.5. Generate Report:

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

Generate report

The report can be downloaded as a PDF or CSV file. Select the file type in the drop down.



You can find it in downloads or select it from the download bar at the bottom of your screen.



Additionally, the report will be saved in the "Students Reports Available" in the Data Panel.

Repor	ts Available	
		[]] Columns
File Name	Creation Date 4	Download
student f4282b7b-c115-457a-899c	8/22/2022, 11:44 AM	

8. Change Style:

You can change the style of the report in several different ways: Header Style and Body Style.



- a) When editing in the Header Style, you have several different options:
 - Heading Colors
 - Text Alignment
 - Text Font Style



- b) When editing the Body Style, you have several options:
 - Font Size to Fit
 - Reduce Font to Fit
 - Cut Font to Fit
 - Change Font Size



9. Open Report:

You can find your report in your Downloads.

student_f4282b7b-c115-457a-899c-da373bbc611d_1661193	1509576.pdf	1 / 587 - 1	100% + 🗈	୬		ŧ	÷	
	Studer	t Report						ľ
	Student:	Last Name	First Name	Address	Phone Number			
	Last Name:	ABREU		Home Address:	2209 BOSSARD DR 55113			
1	Student:	ABREU	RIGOBERTO	2209 BOSSARD DR 55113				
								I
2								

NAVIGATING ALTERNATE REPORTING MODULES

1. Routing Management:

From the Athena Home Page, select the Routing Management application.



2. Alternate Reports:

The Alternate Reports Modules within Athena house standard reports that allow the user greater flexibility when viewing the selected data and driver directions.



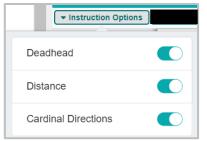
2.1. Run Reports:

The Run report allows the user to apply run related filters, as well as be able to sort by Run ID or Run Start Time.

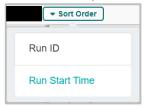
Q				а	09/30/2024	📋 🛛 III Columns				Selected Runs			
586 Results		(1 2	3 4 5 6 7 8			30 Pages		C					× Clear Column
Description	Frequency	Load	Max Duration	Max Load	Run ID	School-BellTi	Description	Frequency	Load	Max Duration	Max Load	Run ID	School-BellTim
ADDAMS IN 9:00	MTWUF	0	15	60	01.078	01 - 9:00 AM	ADDAMS OUT 3:30	MTWUF	0	1s	60	01.178	01 - 3:30 PM
COPY - REVERSE - ADDAMS IN	MTWUF	0	1s	60	01.078-R	01 - 11:30 AM	ADDAMS OUT 3:30	MTWUF	9	1s	60	01.140	01 - 3:30 PM
ADDAMS IN 9:00	MTWUF	0	15	60	01.082	01 - 9:00 AM	ADDAMS IN 9:00	MTWUF	0	1s	60	01.078	01 - 9:00 AM
REVERSE - ADDAMS IN 9:00	MTWU	0	15	60	01.082-R	01 - 3:00 PM	ADDAMS IN 9:00	MTWUF	0	1s	60	01.082	01 - 9:00 AM
ADDAMS OUT 3:30	MTWUF	9		60	01.140	01 - 3:30 PM	COPY - REVERSE - ADDAMS IN	MTWUF	0	15	60	01.078-R	01 - 11:30 AM
ADDAMS OUT 3:30	MTWUF	0	h	60	01.178	01 - 3:30 PM	REVERSE - ADDAMS IN 9:00	MTWU	0	1 5	60	01.082-R	01 - 3:00 PM
	MTWUF	0	D	40	01.178B	01 - 3:30 PM							
-	MTWUF	11	1h	40	01.EO1	01 - 8:00 AM	4					_	
REVERSE -	MTWUF	20	1h	40	01.EO1-R	01 - 2:00 PM				Preview			
REVERSE -	F	0	1h	40	01.E01-R-R	01 - 2:00 PM	Instruction Options Sort Order		d 占	+ Automatic Zoor	n 🗸		🛓 Generate Report
BLACK HAWK IN 9:00	MTWUF	18	15	60	02.015	02 - 9:00			_				
BLACK HAWK OUT 3:30	MTWUF	29	15	60	02.127	02 - 3:30	e c						
COPY - BLACK HAWK OUT 3:30	MTWUF	0	15	60	02.127-C	02 - 9:02	~ f			Run Report		09/30/2024	
COPY - BLACK HAWK OUT 3:30	MTWU	0	1s	60	02.127-C-C	02 - 3:00 PM		ption	Route ID: Desc:	002 Route Description	Start: 7:13:00 A/ End: 7:56:00 A/	M Distance: 14.45 mi M Load: 5	
BLACK HAWK OUT @ 3:30	MTWUF	5	1h	40	02.P01	02 - 3:31 PM	Veh #: 123456 Seq# Stop Time D		Comments:	Imported ad Student Name	Duration: 0:43:00 Phone Specia	MaxLoad: 5 Needs School Grade	
BLACK HAWK IN @ 9:00	MTWUF	5	1h	40	02.S01	02 - 9:01 AM		AYOU DR & OBC	ETRL	ad Student Name		I Needs School Grade	
COPY - BLACK HAWK IN @ 9:00	MTWUF	0	1h	40	02.S01-C	02 - 9:02 AM			5	5 FNamel LNamel	Pick Up 822-202-9999 EMOT,		
HARVARD PARK IN 8:30	MTWUF	9	15	60	03.014	03 - 8:30 AM				FName2 LName2 FName3 LName3 FName4 LName4	822-202-8888 822-202-7777 822-202-6666 BEHV,	5117 K 5117 05 BIP 5117 05	
REVERSE - HARVARD PARK IN	MTWUF	0	15	60	03.014-R	03 - 3:00 PM	Proceed on Eare	t Bay Blvd toward	d Barber St 0.0	FName5 LName5	822-202-5555	5117 03	
HARVARD PARK IN 8:30	MTWUF	17	15	60	03.017	03 - 8:30 AM	Turn left onto Ba Turn left onto Al	arger St 0.09 mi abama Ave 0.51	mi				
F 4						+	Turn right onto i	st cross street ont Egret Bay Blvd 0.	22 mi				
	~	De	port Available			•	Turn left Pass by	Panda Express	(on the right) 0	.12 m			
	g		port Ardinabic		🖹 View Report Que	ues III Columns							
File Name					Creation Time								

- **a.)** Calendar: The date for reports will automatically populate as today's date. The user can select the date for which they want the report to run, allowing them to generate reports for upcoming dates.
- **b.)** Data Panel: The user will select which runs they would like display in the report within the Data Panel—use the Search Tray to query for the applicable information.

- c.) Selected Runs Card: The Selected Runs card will display the data that was selected within the Data Panel.
- d.) Preview Card: The Preview card will display an example of the desired report.
- e.) Instruction Options: The Instruction Options drop-down allows the user to toggle on additional information to be viewed within the report.



f.) Sort Order: The Sort Order drop-down allows the user to sort by specific information within the report.



g.) Report Available: The Report Available card will display a history of all generated reports, the data and time of their creation, as well as provide the ability to re-download a previously generated report.

2.2. Route Report:

The Route Report allows users to print entire routes while accurately displaying deadhead directions, as well as display additional Route information such as: Depot, Contractor, Route Duration, and Route Distance.

	outing » Alternate Reports	» Routes					Act	ive Data Area: pl	lan 🛆
Q)		III Colur	nns			Selecte	d Routes		>
14 Results		1 Pa	ge					× Clear	Columns
✓ Route	Description	Contractor		Route	Description	Contracto	or Comm	ients Assigne	ed r
☑ 123	Test			123	Test			0	-
☑ 124	TEST2	people		124	TEST2	people		1	
DELETETEST	test for deletion			DELET	test for deletion	I		0	
☑ OPT-12				OPT-12				0	
OPT-126				OPT-126				1	
OPT-127				OPT-127				1	-
OPT-13				00T ···				^	
ØPT-4						Pre	view		^
☑ OPT-5		people		- Instructio	n Options	— + Autom	natic Zoom 🗸	🛓 Generate	Report 🔺
SEATS	seats test	people							
TEST	(new route description)								
TEST	uat test					Route Re	eport	04/03/2024	
				Route ID:		Veh #: V-01	Depot: depot	Duration: 0:43:00	
	uat2		•	Run ID:	Route Description AB.025	Comments:Route Comment Star	Contractor: contrac t: 7:13:00 AM Duration		
		•		Desc:	Run Description	End	d: 7:56:00 AM Distance	: 14.45 mi Max Load: 5	
	Report Available		~	Seq# Stop		Run Load Stop Load Student N	lame Phone S	Special Needs School Grade	
		C Reload III Colur	nns			5 5 FName1 U	Pick U Name1 822-202-9999		
File Name		Creation Time				FName2 L FName3 L	Name2 822-202-8888	5117 K 5117 05	
	- 4700 004- 4040 -0-6 4504007475					FName4 L FName5 L		BEHV,BIP 5117 05 5117 03	
alternateroute_389a	ad796-60dc-43d3-a8ef-4b2d60ce7175	4/2/2024, 01:	6	Proce Turn	ed on Egret Bay Blvd t eft onto Barger St 0.09	oward Barger St 0.02 mi 9 mi			

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. Some scenarios that will be discussed include:

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

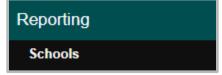
1. Generate Schools Report

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, there are several different filter options.

Searc	h	Q
Select or i	name new search	➡ Filters
Name		🗹 Name
		Bell Times
		School Address
	Q Se	□ City
BES	BILLINGS SCHOOL	School Code
GES	GRANT ELEMENTARY	Comments
JES	JEFFERSON ELEMENT	May Dida Tima
KES	KENNEDY ELEMENTAF	Max Ride Time
LES	LINCOLN ELEMENTAR	Zip Code
LJH	M LEWIS SCHOOL	State
US	LAKELAND SCHOOL	

Select your filter search, then enter the information in the search box. If you want to search all schools, leave the search box blank and click on Search.

3. Data Panel:

All Schools will be listed in the Data Panel.

19 Results	6	~	< 1	>	>>		1 Page
School	≡ Name					≡ City	≡ Location
201	ANACONE	A PAROC	HIAL				2 ANACON
202	LITTLE BU	FFALO					100 LITTL
206	WISERIVE	WISERIVER SCHOOL					2 WISERIV
402	BUFFALO	BUFFALO HEIGHTS				2 BUFFAL	
AES	ADAMS EL	ADAMS ELEMENTARY				100 ADAM	
BES	BILLINGS	SCHOOL					100 BILLIN
GES	GRANT EL	EMENTA	RY				100 GRAN

When selecting a school in the Data Panel, it will highlight and display graphically on the map.

19 Results	« < 1 > »	1 Page	a	
School	≡ Name	≡ City	ol	
201	ANACONDA PAROCHIAL		FIELE	
202	LITTLE BUFFALO		60	· · · ·
206	WISERIVER SCHOOL		TOP	36
402	BUFFALO HEIGHTS			
AES	ADAMS ELEMENTARY			County Rd B E
BES	BILLINGS SCHOOL			County Ku b E
GES	GRANT ELEMENTARY		P.	
JES	JEFFERSON ELEMENTARY			
KES	KENNEDY ELEMENTARY		-	
LES	LINCOLN ELEMENTARY		4	
LJH	M LEWIS SCHOOL			McMenemy S
LLS	LAKELAND SCHOOL			emy

4. Schools Configuration:

When selecting your School, go to the Workspace Panel and select your configuration.

	Configure Report	· · · · · · · · · · · · · · · · · · ·	
	Choose a configuration	pdf ◄	
Calendar Events 💦 🔪			
Name 💽			
Bell Time 🔹 🚺			
Eligibility Rules			

Add any available fields from the following:

- Calendar Events
- Name
- Bell Time
- Eligibility Rules

	Configure Report	~
	Choose a configuration (Choose a configuration)	D.pdf 🔻
Calendar Events	Name	
Eligibility Rules	Bell Time	0

Some fields have sub-fields to choose from—select the plus icon for additional fields.



Name		
Bell Tin	Bell Time	
	Bell Time	
	Early	
	Frequency	
	Late	
	Птуре	
	Operations	0

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

	Configure Report
	Choose a configuration 🖺 🗊 @Reset 🖾 .pdf 🗸
	« Remove All
Calendar Events	Name
Eligibility Rules	Dell Time
	Preview
	P Header Style Body Style Generate Report
Schoo	ols
Schools:	Name
Bell Time:	Bell Time
Schools:	School Name
Bell Time:	08:05
Bell Time:	04:00

Note: The Preview is a sample report.

5. Generate Report:

Click on the Generate Report button.

► Generate Report

The report will download to your computer and also save in the Data Panel under "Schools Reports Available".



2. Generate Run Report

1. Run Reports:

Under Reporting select Runs.

Reporting	
Schools	
Students	
Runs	

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.

2. Data Panel:

The Runs will be listed in the Data Panel.

6 Results	« <	1 > > 1 Page
Run ID	≡ Load	Description
KES.101	10	Kennedy School Run 1 AM
KES.102	20	Kennedy School Run 2 AM
KES.103	35	Kennedy School Run 3 AM
KES.201	7	Kennedy School Run 1 PM
KES.202	1	Kennedy School Run 2 PM
KES.203	2	Kennedy School Run 3 PM

When selecting a run, it will show graphically on the map.

Q			Columns	rison St	guiser or	
6 Results	« «	1 > >	1 Page		Lake Gervais	
Run ID	≡ Load	Description		'E	County Park	Diannas
KES.101	10	Kennedy Sch	ool Run 1 AM	I		Spoon Lake
KES.102	20	Kennedy Sch	ool Run 2 AM		The Church of	Arc
KES.103	35	Kennedy Sch	ool Run 3 AM	Preserve Ct	The Church of Jesus Christ of Latter	36 Arcade St
KES.201	7	Kennedy Sch	ool Run 1 PM			Si contra di seconda di
KES.202	1	Kennedy Sch	ool Run 2 PM	36	Viking Dr.E	20
KES.203	2	Kennedy Sch	ool Run 3 PM	Lark Ave	36 LifePoint Church	
1 2 4				Eddridge Ave E	gerton Park h h ve E S	Keller Regional Park
				cMe	Bellwood Ave	Archery Range
	Reports A	vailable	^	McMenemy St		
			Columns			1000
File Name	Cr	reation Date 🗸	Download	aul Hmong 🗘	Gateway Trail	VI ISO
						Round Lake

3. 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.

« Remove All	Field Order	Sort Order	Max length	Page	Header label
Run ID	1	1~	12	•	Run Id
Covers	Cov	ers			0
			Field Orde		length
		Frequency	1	12	
		Stops			0
		Stop ID	1	12	
		Directions			•
		Instructions	1	12	

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

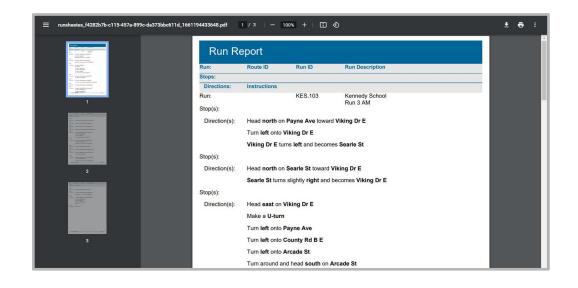
	Previ	ew	· · · · · · · · · · · · · · · · · · ·
		A Header Style A Body Style	Generate Report
Run R	eport		
Run:	Run ID		
Covers:	Frequency		
Stops:	Stop ID		
Directions:	Instructions		
Run Id:	40.010		
Run:	40.010		
Cover(s):	MTWUF		
Stop(s):	120.059		
Direction(s):	N/W		

Select "Generate Report" when you have completed building your report.

▶ Generate report

The report will be downloaded as a PDF. You can find it in downloads or select it from the download bar at the bottom of your screen. From there, you can open the report and print.

Report			
		Columns	
File Name	Creation Date 4	Download	
runsheetes_f4282b7b-c115	8/22/2022, 12:53 PM	1	



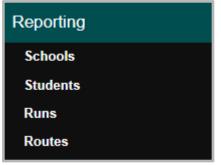
3. Generate Route Report

Here's How:

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

1. Route Reports:

Under Reporting select Routes.



1.1 Routes Search Tray:

Enter your Route ID, or if you leave the search blank, all Routes will appear in the Data Panel.

2. Data Panel:

The Route will be listed in the Data Panel, when selected, it will show graphically on the map.

1 Result	« < 1 > »	1 Page
Route	≡ Description	=
KESROUT	E1 Kennedy School Route 1	

3. Routes Configuration:

In the Configuration section, you can select the fields you want to include in your report. The Covers field has a plus icon indicating there are sub-fields to choose from.



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

Route:	Route ID	Description	
Covers:	Frequency		
Runs:	Run ID	Run Description	
Stops:	Stop ID	Stop Description	
Route Id:	10		
Route:	10	DRIVER: AARON	
		SCOTT	
Cover(s):	MTWUF		
Run(s):	40.010	DUP #33 B.	
		HANSHEW	
Stop(s):	120.059	MAPLE ST & ROANOKE AVE	

Once the report is configured with the sections you want included, select the "Generate Report" button.



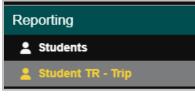
The report will be downloaded as a PDF; you can find it in downloads or select it from the download bar at the bottom of your screen

4. Schedule a CSV Student Trip Report

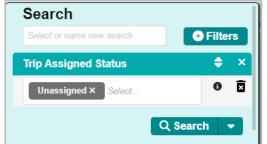
You would like to create a report that identifies any unassigned students within the system, and would like that report to export automatically every Monday and Friday for the remainder of the school year.

Here's How:

1. Navigate to the Reporting Student TR-Trips Module.

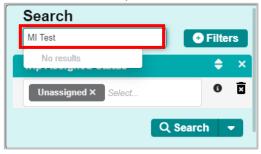


2. Search using the Trip Assignment Status filter.

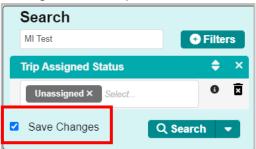


2.1. Save Filter Template in the Search Tray:

Within the Search Tray, the user will name the search parameters as a template by adding the name for the template within the blank upper field, and selecting search.



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



3. Select all students within the Data Panel.

	Last Name	\equiv First Name	\equiv District ID	≡ Address	≡ Ho
			1393881	3725 N P	. x
			1399502	57 GLEN	. x
			1391207	1601 N 1	×
			1368930	1700 W I	×
			1393832	2528 DEL.	×
ľ			1397853	1504 PE	×
			1390353	1330 E L	×
			1392548	1853 S 1	×
			1390039	3355 GAI	. x

4. Configure Report:

Within the Configure Report card the user can create the report as follows:

	Configure Report		^
Scheduled Scsv - Portrait -		C MI Test 1	F ()
Begin Da	« Remove All b		Sort Order
Date Of Birth	Edulog ID		~
E-mail	C District ID		1~
Eligibility	Last Name		2 🗸
Enrollment Date	First Name		~
Ethnicity	Address		
Exclusive Stop			

- a.) Set to CSV
- **b.)** Add the following filters as seen above.
- 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".
 - Note: By saving the report as a template, the user will see the following confirmation message.



5. Create a Schedule:

After saving the report as a template, the user can then select the "Schedule" tool, and follow the below steps:



	Edit So	chedule		
Schedule a				
O One Time b	Start Date *		Scheduled Time *	
O Daily	02/12/2024	× 🚞	05:00 PM	×
	End Date			
Day(s) of the Week	05/24/2024	× 🚞		
d	Day(s) of the Week	*		
	Monday Friday			× 👻
Filter Condition *	1	Configure Report *	f	
MI Test	× 👻	MI Test 1		× 👻
	Cancel	Save		

- a.) Schedule: Select one of the 3 schedule types.
 - **One Time:** Schedule a non-repeating export of the report.
 - **Daily:** Create a daily export of the selected report.
 - Day(s) of the Week: Create a weekly export of the selected report.
- **b.) Start and End Date:** Select the date range in which the selected schedule type will be employed within.
- c.) Scheduled Time: What time will the report run on the selected day(s) of the week.
- d.) Day(s) of the Week: Select the day or days of the week that the report will be scheduled to be exported.
- e.) Filter Condition: Select the saved search tray template in the drop-down field.
- f.) Configure Report: Select the save reporting template in the drop-down field.

5.1. Save Schedule:

Saving the reporting schedule the user will see a confirmation message populate on their screen.



6. Verify the Saved Reporting Schedule:

To verify the reporting schedule saved, the user can navigate to the Scheduled Reports Module, and verify the schedule in the "Manually Run/Scheduled Reports" card.

Reporting								
Students								
💄 Student TR - Tri	Р							
് Runs								
+‡ Routes								
盒 Schools								
🛱 Vehicles								
🛗 Scheduled Repo	orts							
Manually Run/Scheduled Reports						^		
							C	Reload
Report Type	Report Name	Туре	Status	Scheduled Time	Next Run Time	Executed Time	Edit	Са
Student Transportati	MI Test 1	Sched	Pending	02/12/2024, 05:00 PM	02/12/2024, 05:00 PM		Ľ	×