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ATHENA ROUTING & PLANNING

Reporting Training Resource Guide

Reporting
Training Resource Guide

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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.
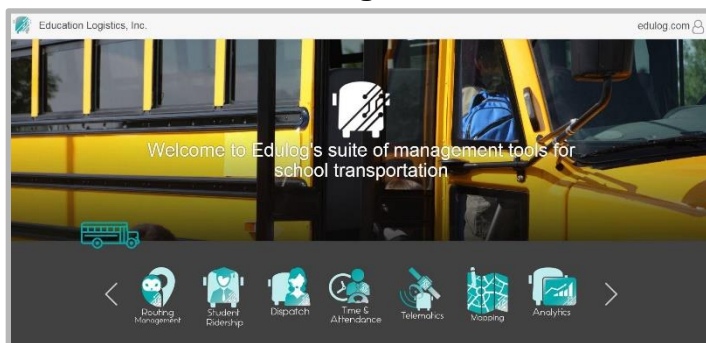
NAVIGATING REPORTING MODULES

1. **Sign In:**
   You will first be brought to the Sign In page where you will enter your Username (email), and Password.
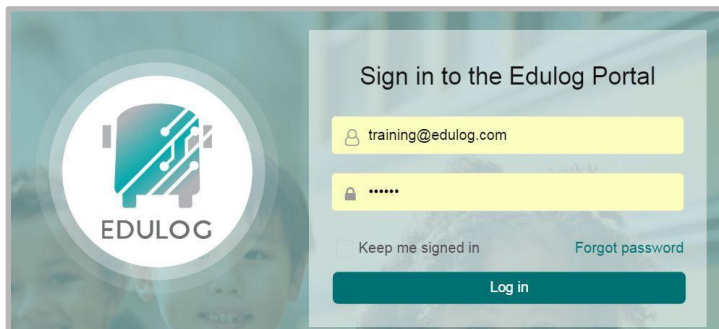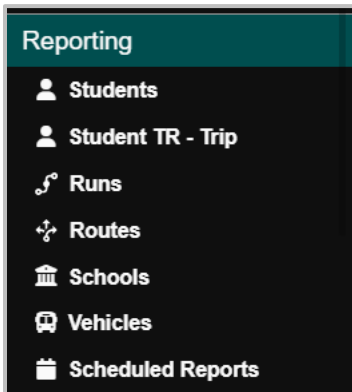

2. **Athena Portal Home Page:**

3. **Routing Management:**
   In this guide we will go into Routing Management – click on the Athena Owl.
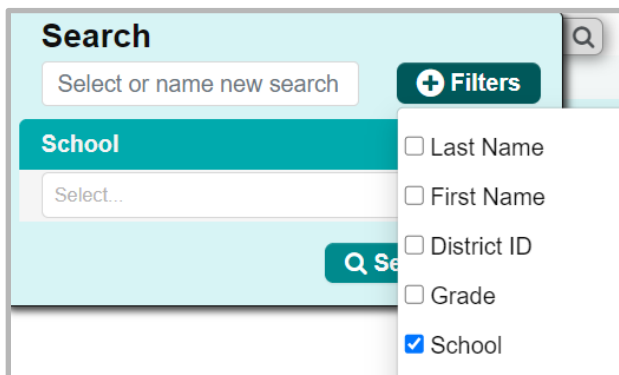
4. Select Report:

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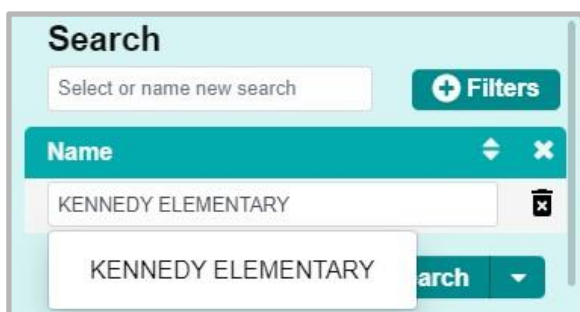

5. Reports Search Tray:

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.
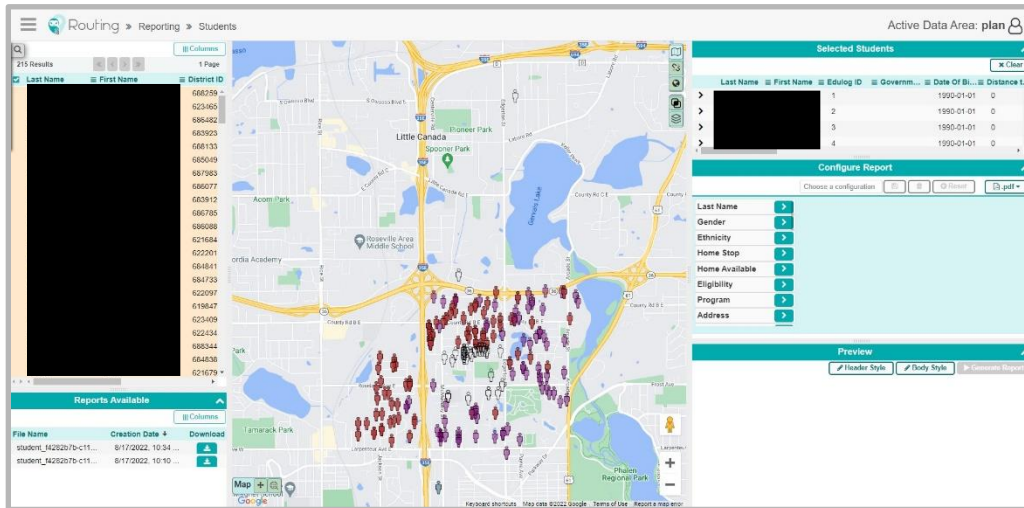

Once your search is completed, close the search tray using the tab.

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.
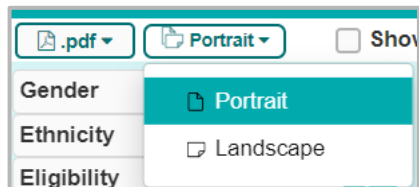

7. Configure Report:

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.
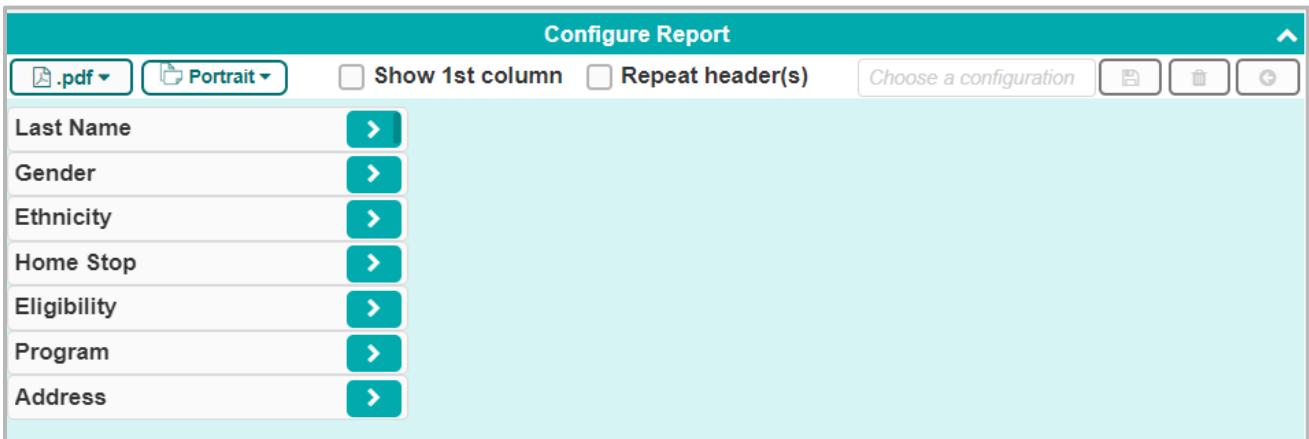
7.1. PDF Reports:

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

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.

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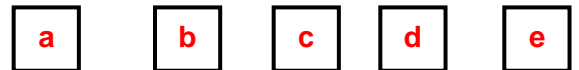

7.2. Preview:

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.

Note: *The Preview is a sample report.*

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

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.

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.

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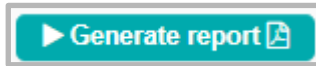You can save a configuration by entering a name in the "Choose a Configuration Box".

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	💾	🗑	⟳ 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.

⟳ Reset	📄 .pdf ▾
pdf	
csv	

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

📄 student_f4282b7b....pdf ^

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

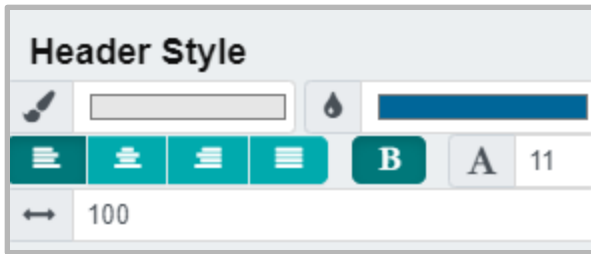| Reports Available		^
		‖‖ Columns
File Name	**Creation Date** ↓	**Download**
student_f4282b7b-c115-457a-899c...	8/22/2022, 11:44 AM	⬇

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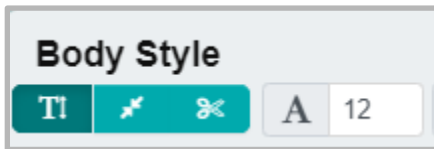
✏ Header Style   ✏ Body Style

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.

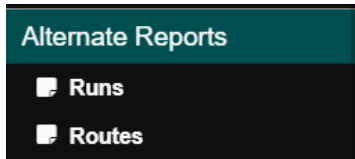# NAVIGATING ALTERNATE REPORTING MODULES

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.


   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.
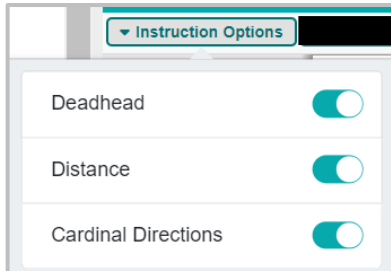
f.) Sort Order: The Sort Order drop-down allows the user to sort by specific information within the report.
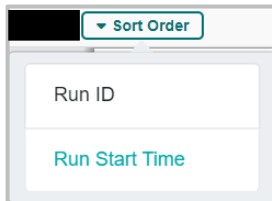
g.) Report Available: The Report Available card will display a history of all generated reports, the data and time of their creation, as well as provide the ability to re-download a previously generated report.

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.

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
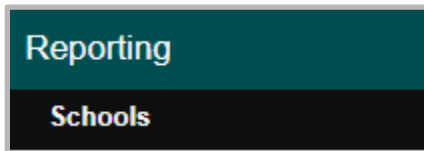- ➢ Generate Route Report
- ➢ Schedule a CSV Student Trip Report

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1. Generate Schools Report

Here's How:

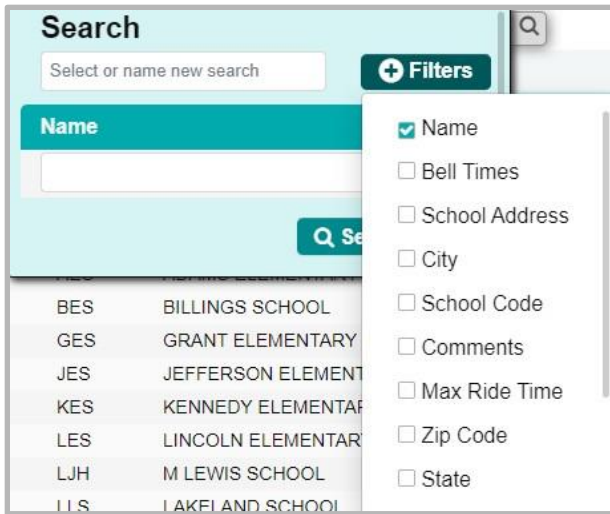Once logged in to Routing Management, go to Reporting in the Action Bar.

1. **Schools Report:**
   Under Reporting, select Schools.

2. **Schools Search Tray:**
   The Search Tray will appear, there are several different filter options.

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.
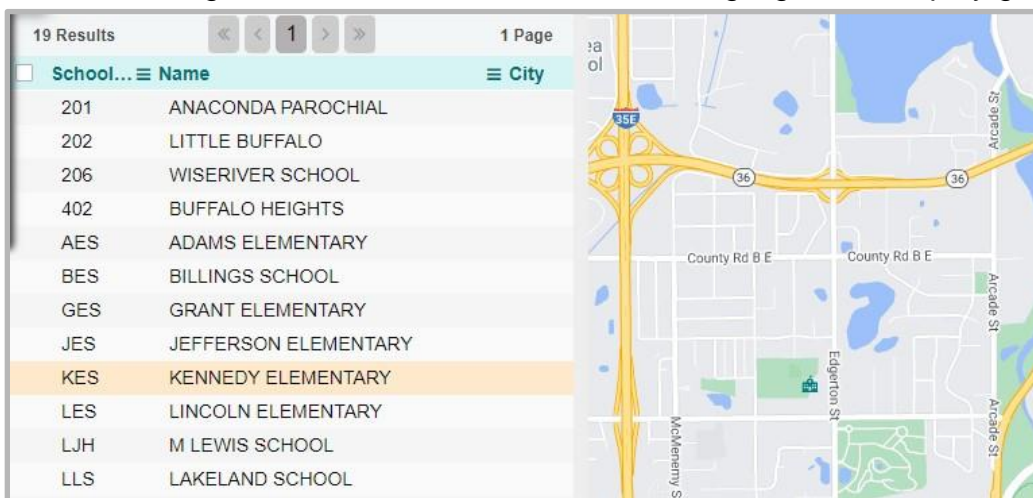
3. **Data Panel:**
   All Schools will be listed in the Data Panel.

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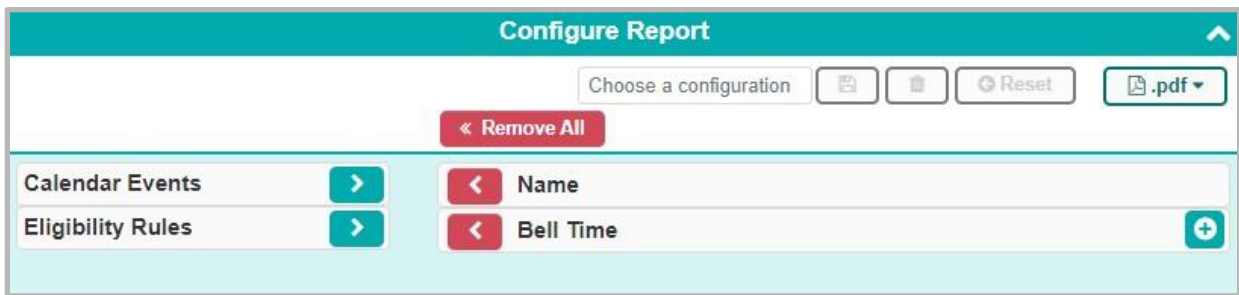

4. **Schools Configuration:**
   When selecting your School, go to the Workspace Panel and select your configuration.

Add any available fields from the following:
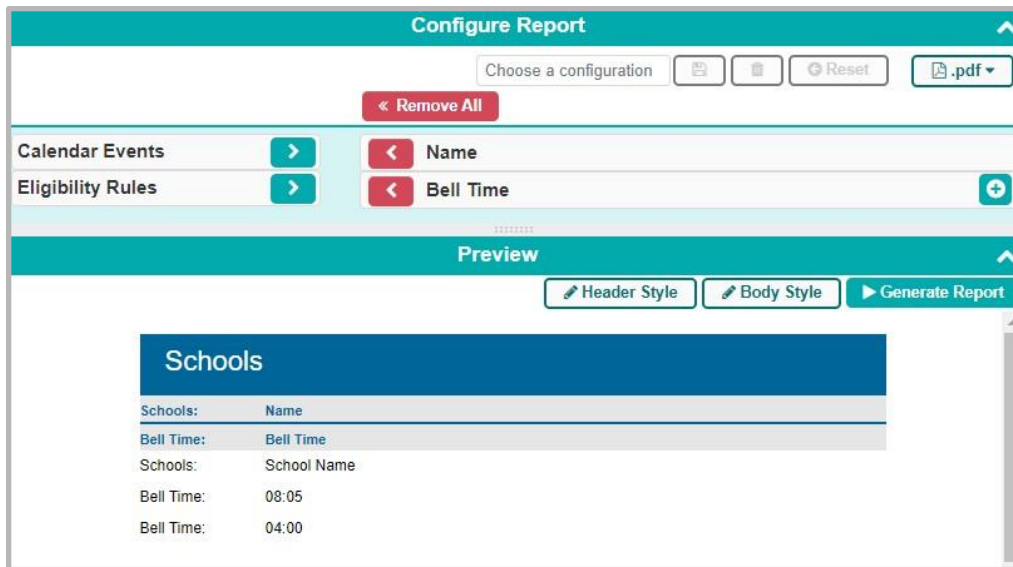
- Calendar Events
- Name
- Bell Time
- Eligibility Rules

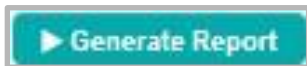Some fields have sub-fields to choose from—select the plus icon for additional fields.

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

Note: The Preview is a sample report.

5. **Generate Report:**
   Click on the Generate Report button.

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:**
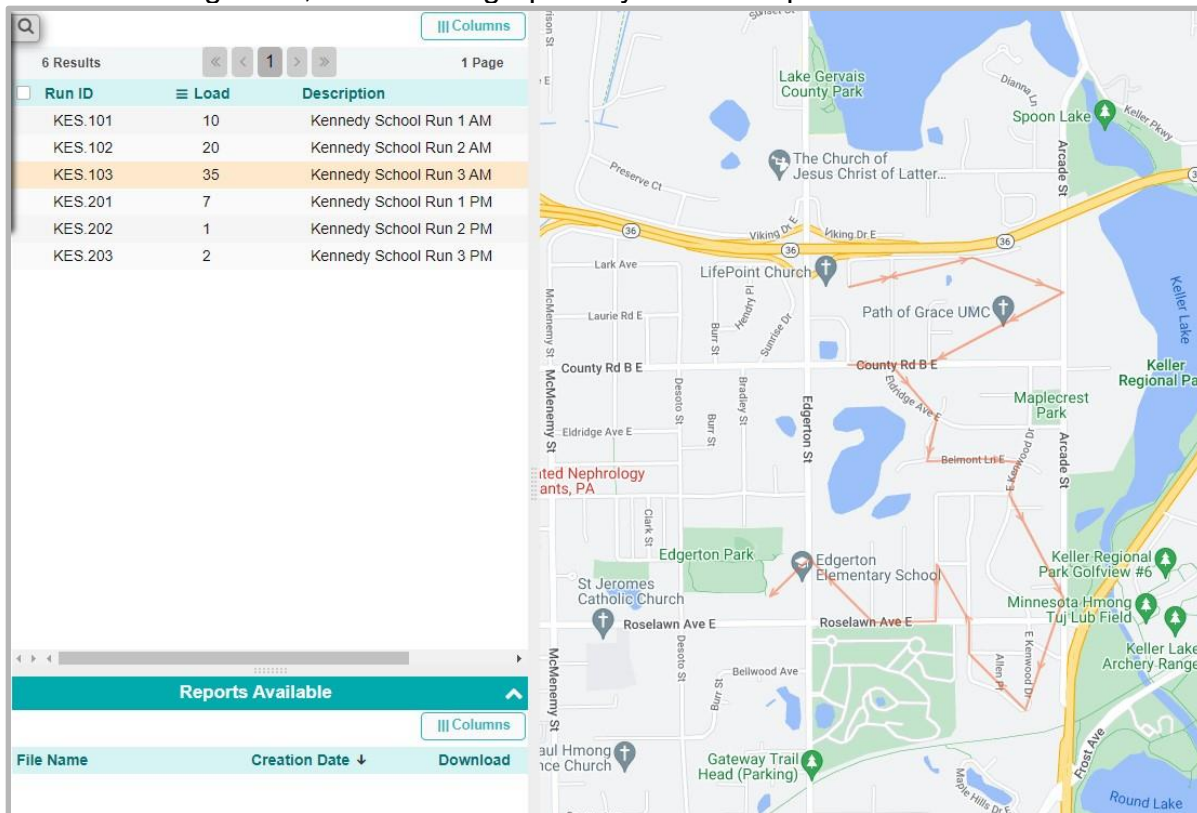   Under Reporting select Runs.

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:**
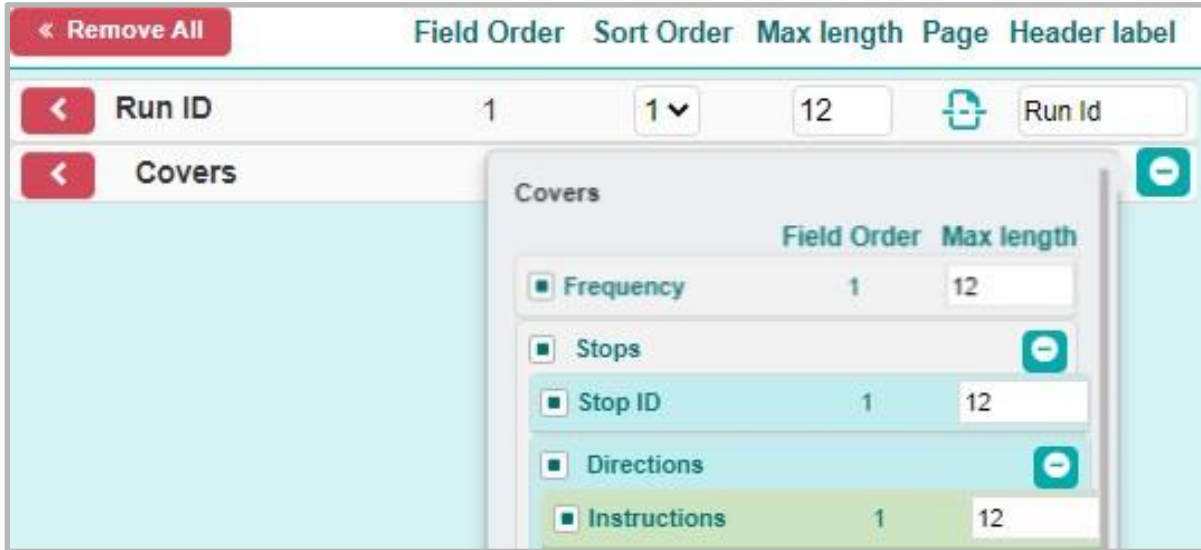The Runs will be listed in the Data Panel.

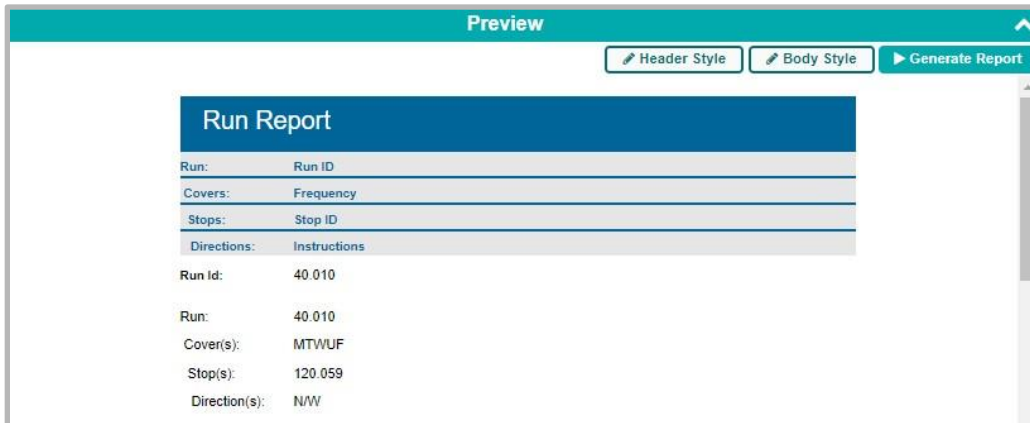When selecting a run, it will show graphically on the map.

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.

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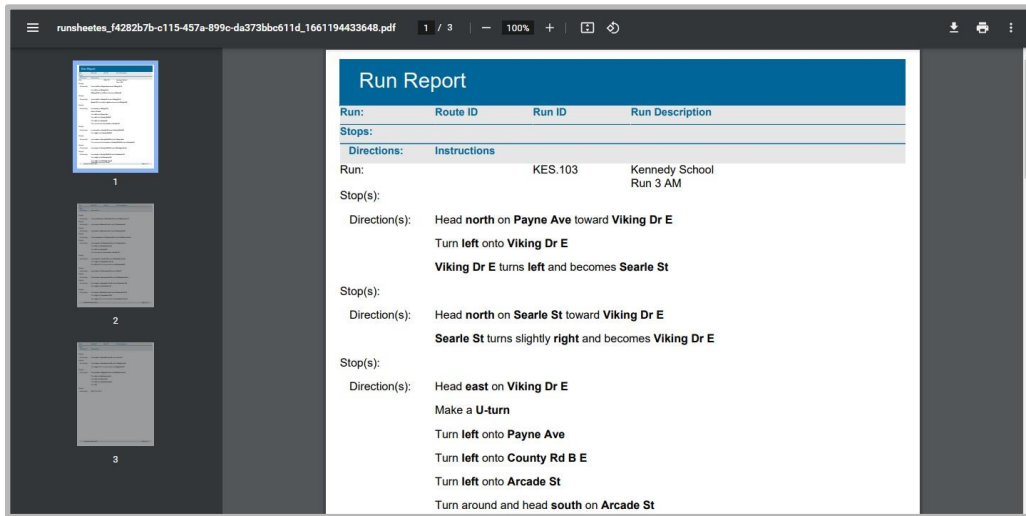

Select "Generate Report" when you have completed building your report.

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.

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3. Generate Route Report

Here's How:

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

1. **Route Reports:**
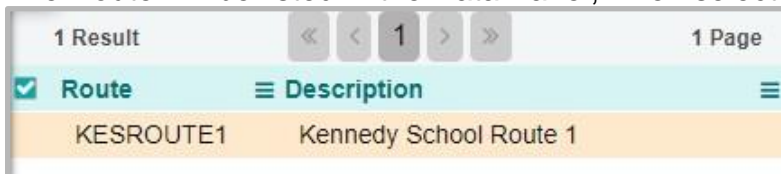   Under Reporting select Routes.

> **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.

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.

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
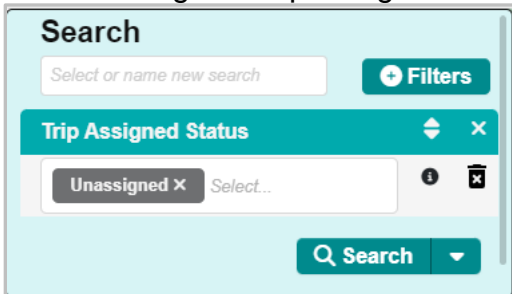
4. Schedule a CSV Student Trip Report

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.
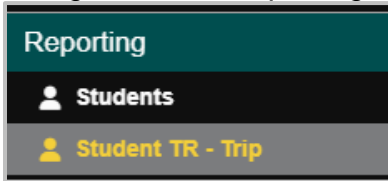
2. Search using the Trip Assignment Status filter.
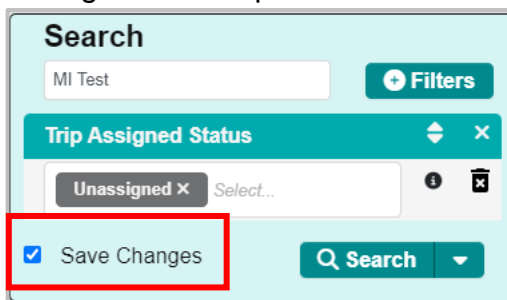

   2.1. Save Filter Template in the Search Tray:
   Within the Search Tray, the user will name the search parameters as a template by adding the name for the template within the blank upper field, and selecting search.
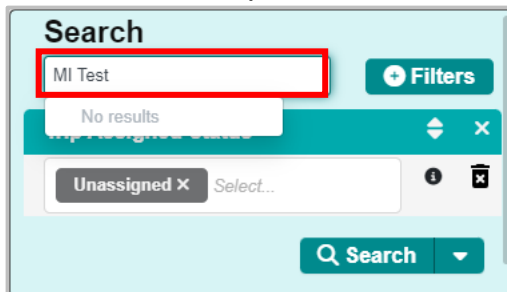
   The user will see the search tray update with an additional Save Changes field following saving it as a template.

3. Select all students within the Data Panel.

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

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

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.

✔ Operation Successful

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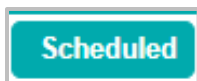
Scheduled

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 - Trip
- Runs
- Routes
- Schools
- Vehicles
- **Scheduled Reports**

Manually Run/Scheduled Reports

C Reload

Report Type	Report Name	Type	Status	Scheduled Time	Next Run Time	Executed Time	Edit	Ca...
Student Transportati...	MI Test 1	Sched...	Pending	02/12/2024, 05:00 PM	02/12/2024, 05:00 PM		✎	✕