

ATHENA STUDENT UTILITIES

Education Logistics, Inc.

Training
Guide

2024



Athena Student Utilities Training Guide

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PURPOSE OF THIS GUIDE

This Athena Student Utilities Training Guide is for district Administrators. It will provide you with explanations of the basic Student Utilities within Athena. Student Utilities assist in batch operations on student records.

ATHENA STUDENT UTILITIES INTRODUCTION

This guide will give you step by step instructions on how to use Student Utilities, like update student eligibility, find service for students, deassign students, and address match unmatched students.

NAVIGATING THE STUDENT UTILITIES MODULE

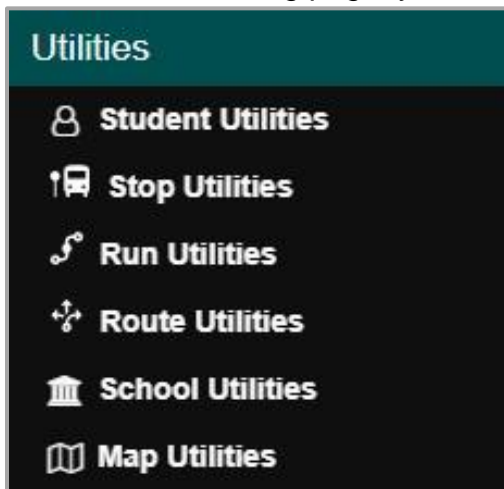
1. Tools

Once logged in, go to Tools on the Home Page.



2. Student Utilities

On the Tools landing page, you will see the main menu to the left. This is the Action Bar.



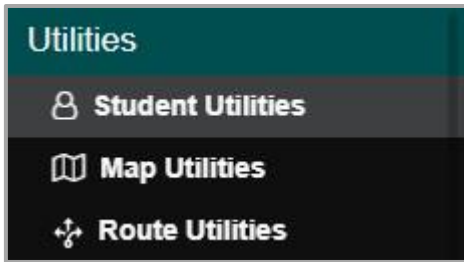
3. Action Bar

You can open and close the Action Bar by selecting the hamburger icon.



4. Student Utilities

In the Action Bar, select the Student Utilities Module.



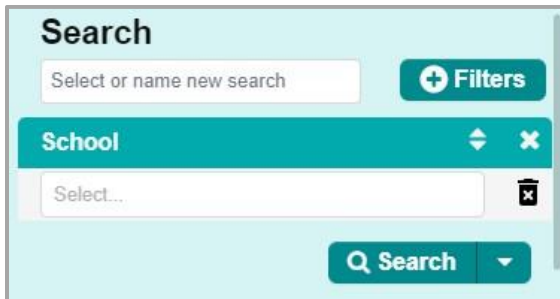
5. Select Students

At the top of the module, be sure to select Students or Inactive Students.



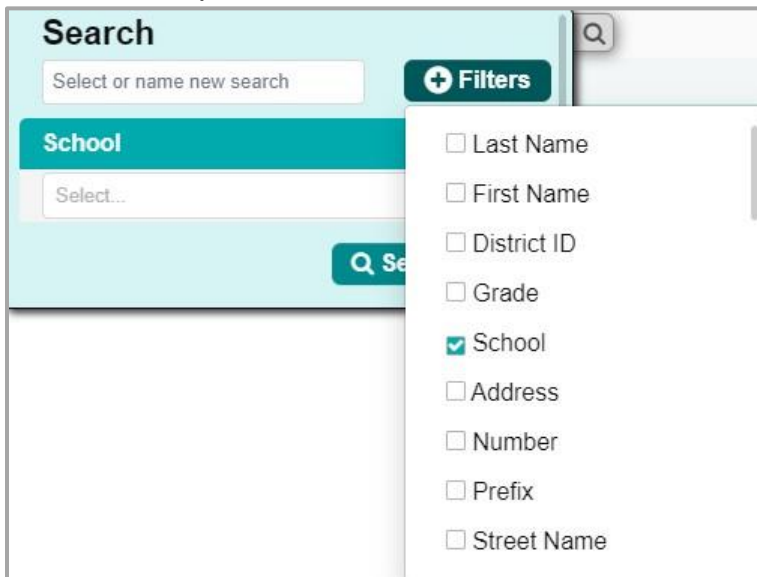
6. Search Tray

The search tray will appear and has various filters to choose from.



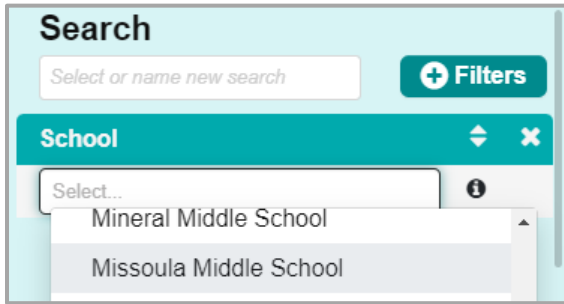
7. Filters

For this example, we will select the school filter.



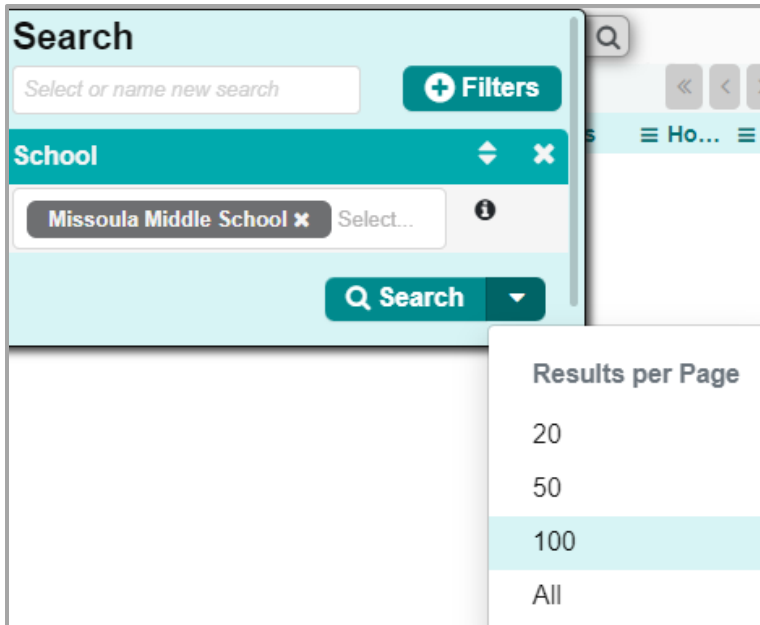
8. School in Dropdown

In the search box, select the school.



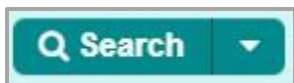
9. Results per Page

Then select 100 in the drop-down menu. Keep in mind that if you do a batch of over 100, it could take a long time to process.



10. Search

Then click on Search.



11. Data Panel

Students will appear in the Data Panel.

Tools > Utilities > Student Utilities Active Data Area: plan

Columns | All Record Sync

959 Results | 1 | 2 3 4 5 6 7 8 > | 10 Pages

| Last Name | First Name | District ID | Address |
|-----------|------------|-------------|--------------------|
| ACRVFPO | Jada | 335706 | 1804 FLETCHER ROAD |
| | | 294122 | 54 |
| | | 49197 | 1E |
| | | 21442 | 2E |
| | | 256567 | 1E |
| | | 359832 | 2E |
| | | 20957 | 3E |
| | | 306334 | 2E |
| | | 93947 | 1E |
| | | 303306 | 3E |
| | | 116906 | 2E |
| | | 326798 | 2E |
| | | 197124 | 1E |
| | | 79153 | 6E |
| | | 362046 | 5E |
| | | 318430 | 6E |
| | | 224913 | 2E |
| | | 28581 | 1E |
| | | 357958 | 3E |
| | | 377240 | 4E |

Batch Operations Available

| Created time | Type | Status | Result | Download |
|-----------------|-------------|-----------|---------|----------|
| 8/31/23, 9:4... | Eligibility | Completed | Success | Download |
| 8/31/23, 9:4... | Eligibility | Completed | Success | Download |
| 8/31/23, 9:3... | Eligibility | Completed | Success | Download |
| 8/28/23, 1:2... | Eligibility | Completed | Success | Download |
| 8/28/23, 1:1... | Eligibility | Completed | Success | Download |
| 8/28/23, 1:0... | Eligibility | Completed | Success | Download |
| 8/28/23, 12... | Eligibility | Completed | Success | Download |

12. Select All Students

Select all student by choosing the box at the top of the Data Panel.

Last Name

Tools > Utilities > Student Utilities

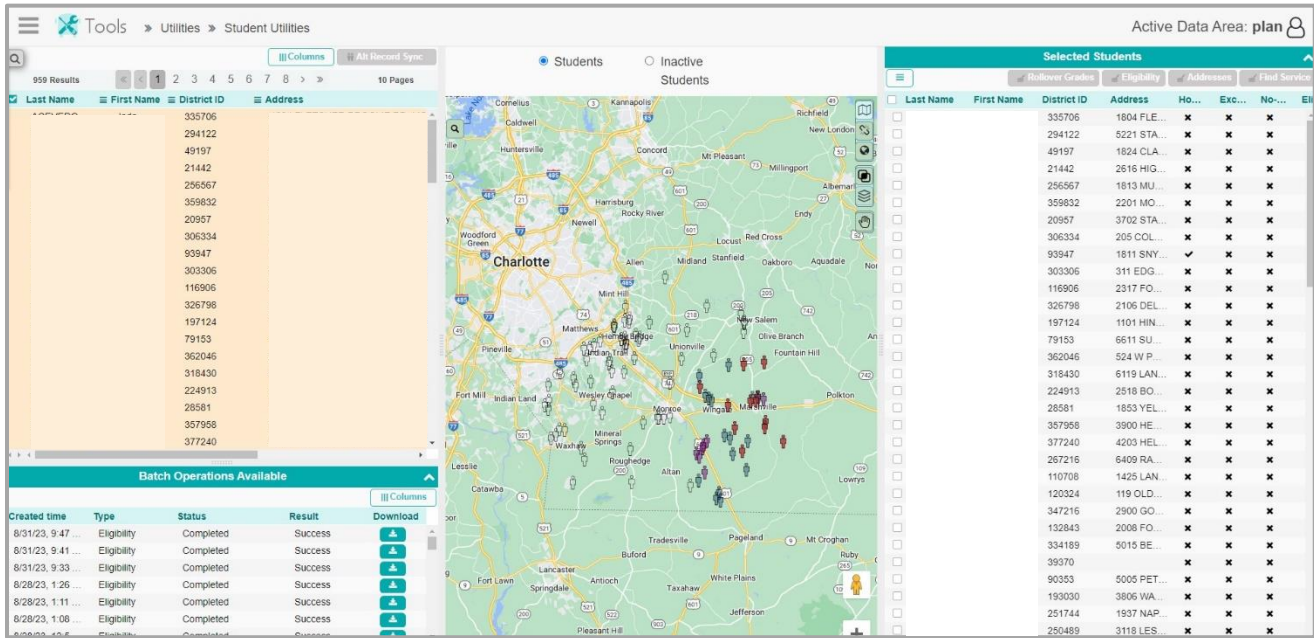
Columns | All Record Sync

959 Results | 1 | 2 3 4 5 6 7 8 > | 10 Pages

| <input checked="" type="checkbox"/> Last Name | First Name | District ID | Address |
|---|------------|-------------|---------|
| | | 335706 | |
| | | 294122 | |
| | | 49197 | |
| | | 21442 | |
| | | 256567 | |
| | | 359832 | |
| | | 20957 | |
| | | 306334 | |
| | | 93947 | |
| | | 303306 | |
| | | 116906 | |
| | | 326798 | |
| | | 197124 | |
| | | 79153 | |
| | | 362046 | |
| | | 318430 | |
| | | 224913 | |
| | | 28581 | |
| | | 357958 | |
| | | 377240 | |

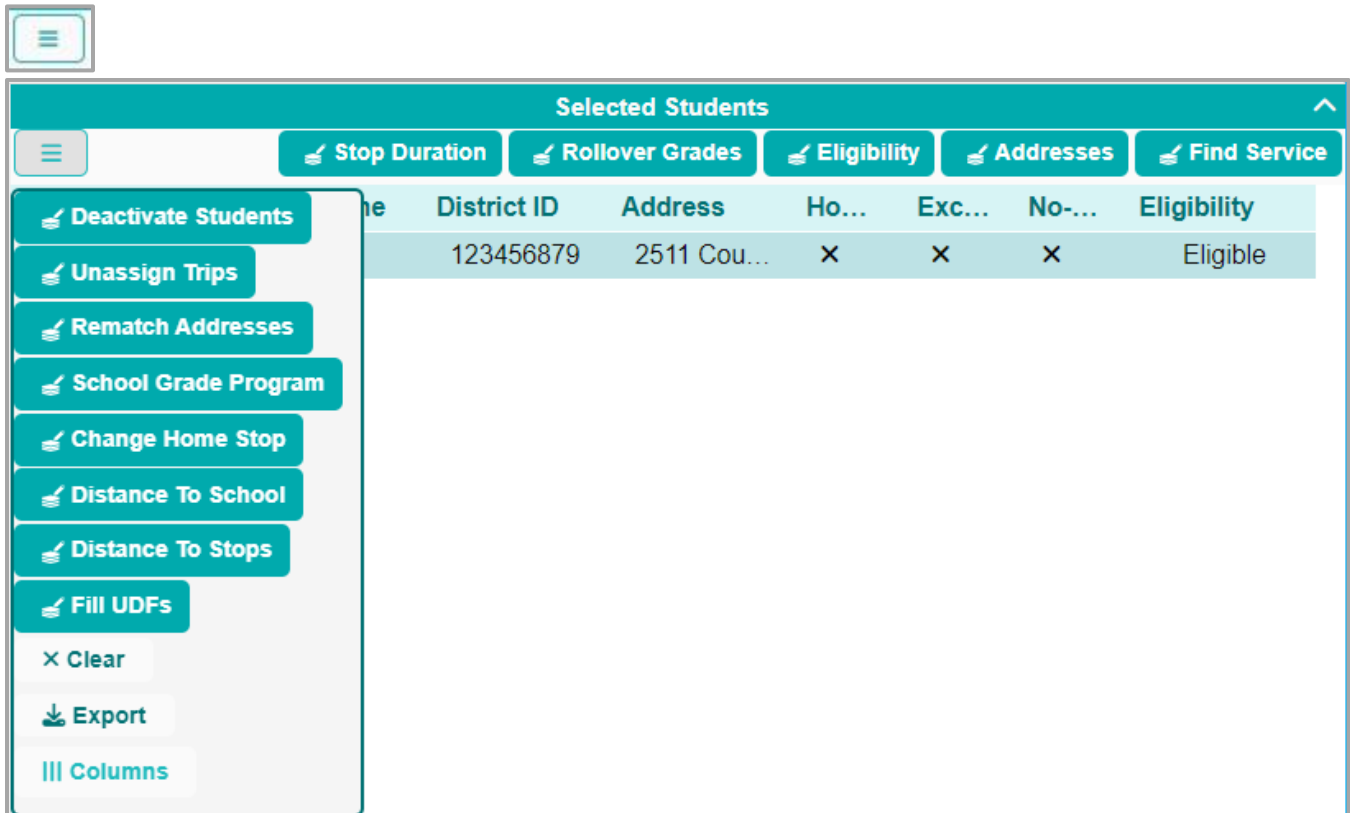
13. Workspace Panel

When selected, they will also be listed in the Workspace Panel.



14. Selected Students

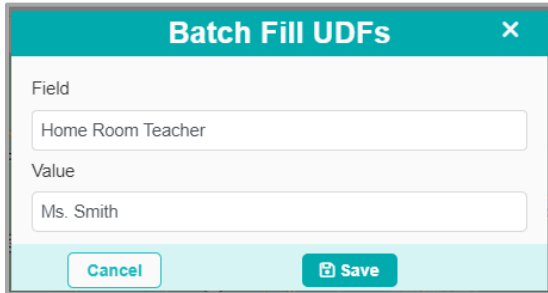
Selecting a student or students in the workspace panel, will activate the utilities batch buttons. You can access all buttons with the column's icon.



15. Fill UDFs

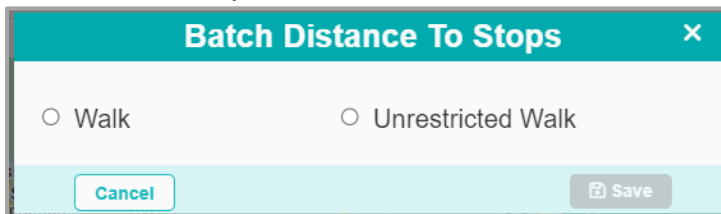
The Fill UDFs tool allows the user to batch fill in a selected UDF field for multiple selected students.

For example, the user could fill in the “Home Room Teacher” field for all students at once, versus having to go into each student’s Athena file individually.

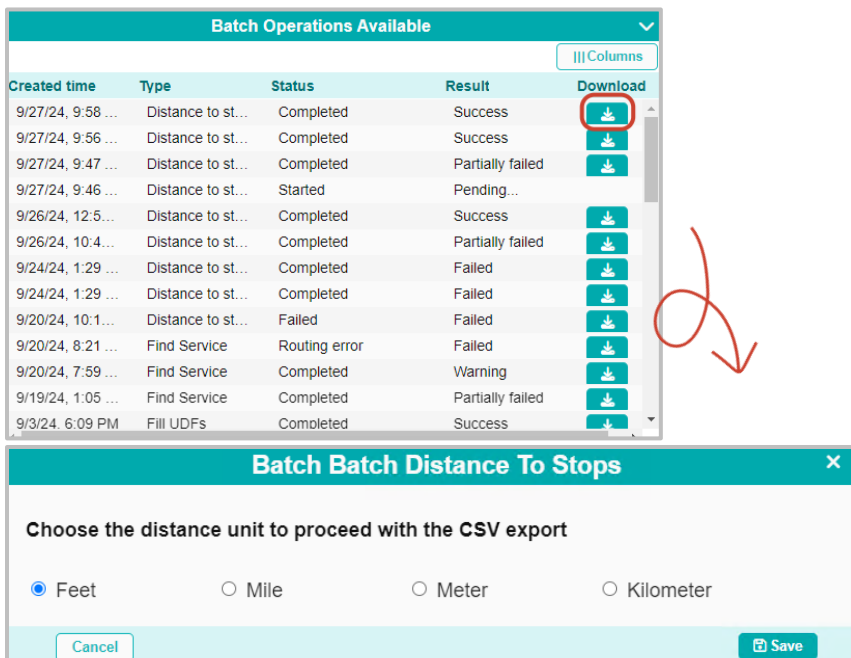















16. Distance to Stops

The Distance to Stops tool allows the user to recalculate the walk or unrestricted walk distance to the students stop for all selected students.



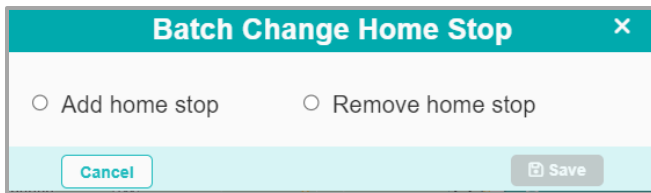
Additionally, you have the option to export these changes to view in different distance measurements. In the “Batch Operations Available” card, you can click the *download* button, which will bring up a child window allowing you to select measurement type.



| Created time | Type | Status | Result | Download |
|-------------------|-------------------|---------------|------------------|---|
| 9/27/24, 9:58 ... | Distance to st... | Completed | Success |  |
| 9/27/24, 9:56 ... | Distance to st... | Completed | Success |  |
| 9/27/24, 9:47 ... | Distance to st... | Completed | Partially failed |  |
| 9/27/24, 9:46 ... | Distance to st... | Started | Pending... |  |
| 9/26/24, 12:5... | Distance to st... | Completed | Success |  |
| 9/26/24, 10:4... | Distance to st... | Completed | Partially failed |  |
| 9/24/24, 1:29 ... | Distance to st... | Completed | Failed |  |
| 9/24/24, 1:29 ... | Distance to st... | Completed | Failed |  |
| 9/20/24, 10:1... | Distance to st... | Failed | Failed |  |
| 9/20/24, 8:21 ... | Find Service | Routing error | Failed |  |
| 9/20/24, 7:59 ... | Find Service | Completed | Warning |  |
| 9/19/24, 1:05 ... | Find Service | Completed | Partially failed |  |
| 9/3/24, 6:09 PM | Fill UDFs | Completed | Success |  |

17. Change Home Stop

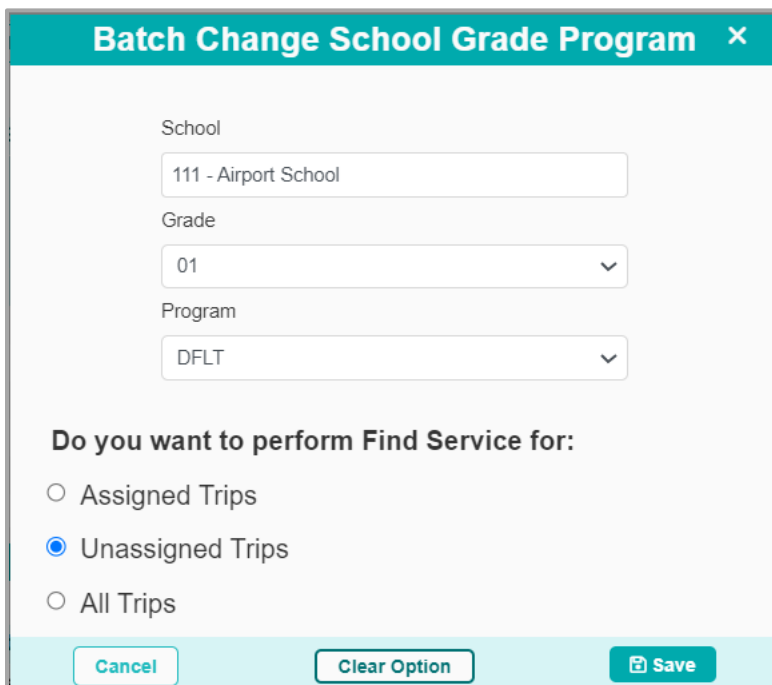
The Change Home Stop tool allows the user to add or remove a home stop from multiple selected student records at once.



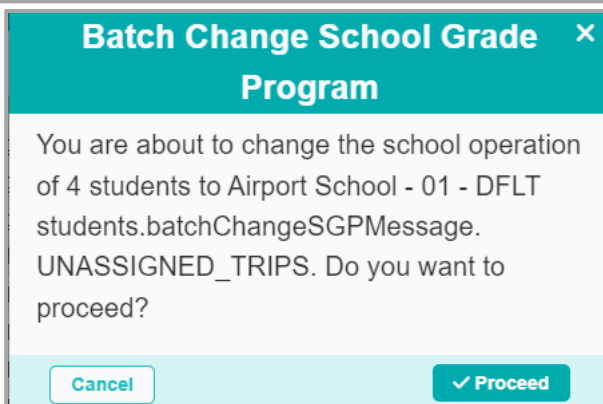
A dialog box titled "Batch Change Home Stop" with a close button (X) in the top right corner. It contains two radio buttons: "Add home stop" and "Remove home stop". At the bottom, there are two buttons: "Cancel" and "Save".

18. School Grade Program

The School Grade and Program tool allows the user to change the SGP for multiple selected students and/or perform Find Service for all Unassigned or Assigned trips amongst the selected students.



A dialog box titled "Batch Change School Grade Program" with a close button (X) in the top right corner. It contains three input fields: "School" (text box with "111 - Airport School"), "Grade" (dropdown menu with "01"), and "Program" (dropdown menu with "DFLT"). Below these fields is a section titled "Do you want to perform Find Service for:" with three radio buttons: "Assigned Trips", "Unassigned Trips" (selected), and "All Trips". At the bottom, there are three buttons: "Cancel", "Clear Option", and "Save".



A dialog box titled "Batch Change School Grade Program" with a close button (X) in the top right corner. It contains a message: "You are about to change the school operation of 4 students to Airport School - 01 - DFLT students.batchChangeSGPMessage.UNASSIGNED_TRIPS. Do you want to proceed?". At the bottom, there are two buttons: "Cancel" and "Proceed".

19. Rematch Addresses

The Rematch Addresses tool allows the user to batch rematch the address for matched and/or unmatched students—this tool allows the user to target students who were not matched to their home address within the Student Import process.

- This tool additionally allows the user to ask the system to retain the previously assigned stop for previously matched students, or ask the system to find a new stop service for the selected students.

The screenshot shows a dialog box titled "Batch Rematch Addresses" with a close button (X) in the top right corner. Under the heading "Parameters", there are two rows of radio button options. The first row is for "Address" with options "Matched", "Unmatched", and "All". The second row is for "Stop Assignment" with options "Keep stop" and "Find service". At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Save" on the right.

20. Unassign Trips

This tool allows the user to batch unassign Default and/or Custom trips for all students selected within the Workspace Panel of Student Utilities. Based on the TR type, the user will then identify if the system will unassign the To School and/or From School Trip.

The screenshot shows a dialog box titled "Unassign" with a close button (X) in the top right corner. The question "Which student trips should be updated?" is displayed. Below it, there are two rows of radio button options. The first row is for "TR Types" with options "Default", "Custom", and "All". The second row is for "Directions" with options "To school", "From school", and "Both". At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Save" on the right.

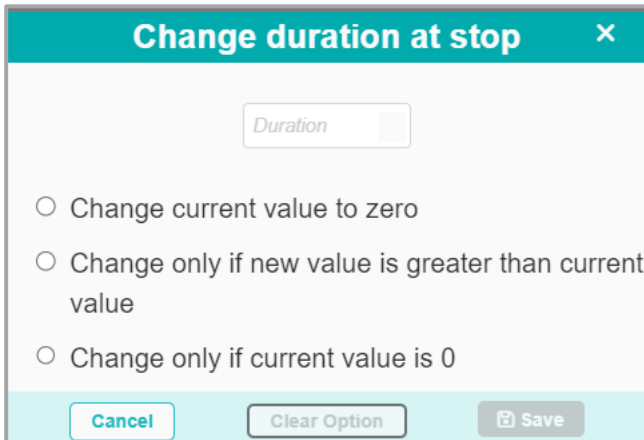
21. Deactivate Students

This tool allows the user to batch deactivate student records within Athena.

The screenshot shows a dialog box titled "Student deactivation" with a close button (X) in the top right corner. The text inside reads: "You are about to deactivate 1 students. Do you want to proceed?". At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Proceed" on the right.

22. Stop Duration

This tool allows the user to batch adjust the stop duration (The time spent at a stop) for multiple selected students.

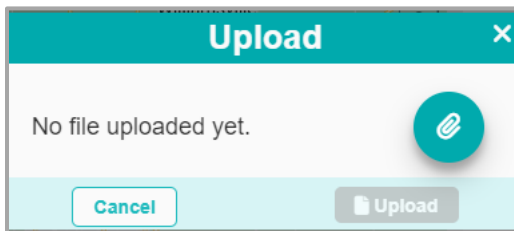


The dialog box has a teal header with the title "Change duration at stop" and a close button (X). Below the header is a text input field labeled "Duration". Underneath the input field are three radio button options:

- Change current value to zero
- Change only if new value is greater than current value
- Change only if current value is 0

At the bottom of the dialog box are three buttons: "Cancel", "Clear Option", and "Save".

23. Rollover Grades

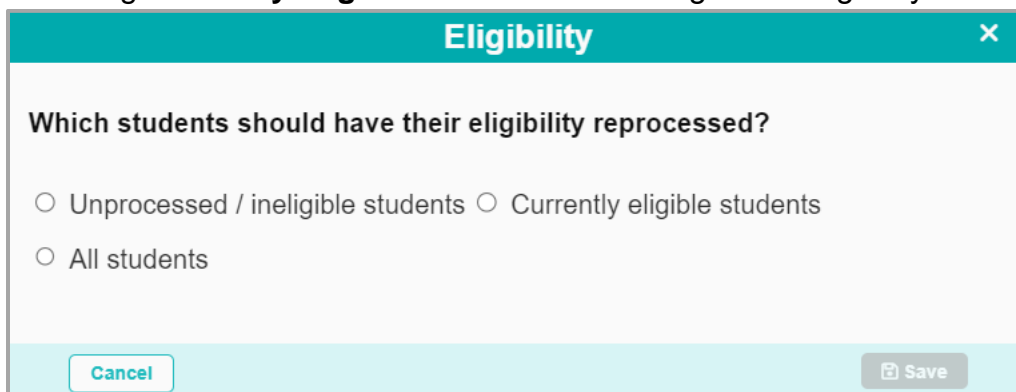


The dialog box has a teal header with the title "Upload" and a close button (X). Below the header, it says "No file uploaded yet." and features a circular teal button with a white paperclip icon. At the bottom of the dialog box are two buttons: "Cancel" and "Upload".

24. Eligibility

This tool allows the user to batch adjust student eligibility in the system.

- Selecting **Unprocessed/Ineligible Students** will change their eligibility to "Eligible"
- Selecting **Currently Eligible Students** will change their eligibility to "Not Eligible".

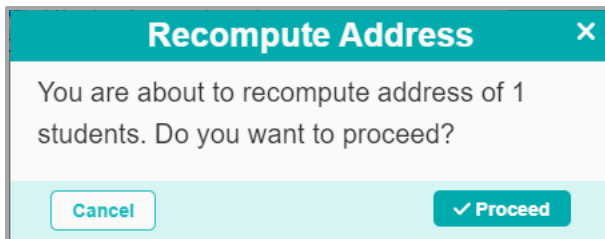


The dialog box has a teal header with the title "Eligibility" and a close button (X). Below the header, it asks "Which students should have their eligibility reprocessed?". There are three radio button options:

- Unprocessed / ineligible students
- Currently eligible students
- All students

At the bottom of the dialog box are two buttons: "Cancel" and "Save".

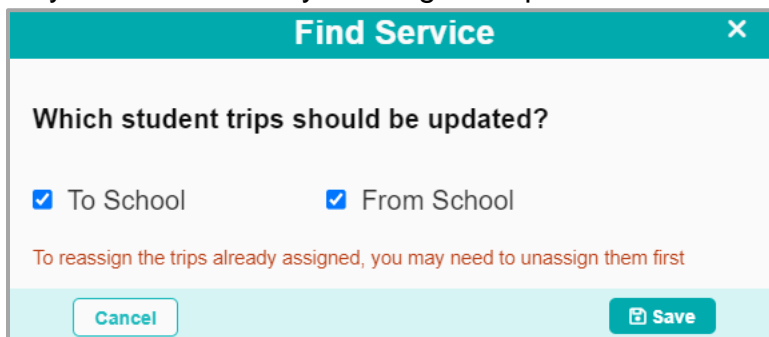
25. Addresses



26. Find Service

The Find Service tool allows the user to ask the system to find and assign unassigned student trips to an appropriate stop based on established walk distances.

- This tool will not unassign previously assign trips to complete the find service request, this tool only works for already unassigned trips.



27. Distance to School

The Distance to School tool allows the user to calculate all selected student's walk, unrestricted walk, and drive distance using multiple units of measurement: feet, miles, meters, or kilometers.

Batch Distance To School
✕

Please select the destination schools and the type of calculation :

List of Schools

| School Code | Name ↑ | Address |
|---|------------------------|---------|
| <input type="checkbox"/> 67 | | |
| <input type="checkbox"/> 101 | | |
| <input type="checkbox"/> 01 | ADDAMS | |
| <input type="checkbox"/> 38 | ALTERNATIVE PM PROGRAM | |
| <input checked="" type="checkbox"/> 111 | Airport School | |
| <input type="checkbox"/> 35 | BALL CHARTER | |
| <input type="checkbox"/> 71 | BALL ELEMENTARY | |
| <input type="checkbox"/> 02b | BLACK HAWK | |
| <input type="checkbox"/> 04 | BUTLER | |

Calculation Type

Calculate for each student and their attendance school only

Calculate for each student's attendance school and selected schools.

Calculate for each student to selected schools only

Calculation Path

Walk Unrestricted Walk Drive

Cancel Save

When navigating to the Batch Operations Available card to download the completed operation for “Batch Distance to School”, the following window will populate asking the user to select their preferred unit of measurement when calculating the walk/drive distance:

Batch Distance to School
✕

Choose the distance unit to proceed with the CSV export

Feet Mile Meter Kilometer

Cancel Save

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:

- [Update Student Eligibility](#)

- Find Service for Students
- Address Match Unmatched Students
- School, Grade, Program
- Rematch Address
- Deactivate Students
- Stop Duration
- Rollover Grades

Update Student Eligibility

As a Transportation Administrator, I would like to update Eligibility codes based on boundaries that have been changed.

1. Tools

Once logged in, go to Tools on the Home Page.



2. Student Utilities

In the Action Bar, select the Student Utilities Module.



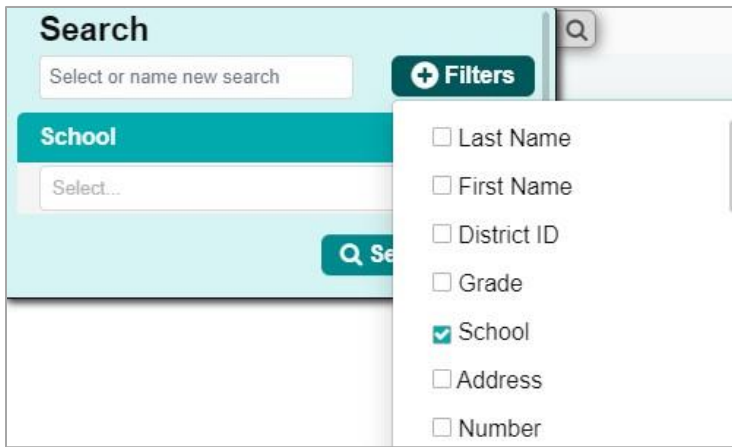
3. Select Students

At the top of the module, be sure to select Students.

 Students Inactive Students

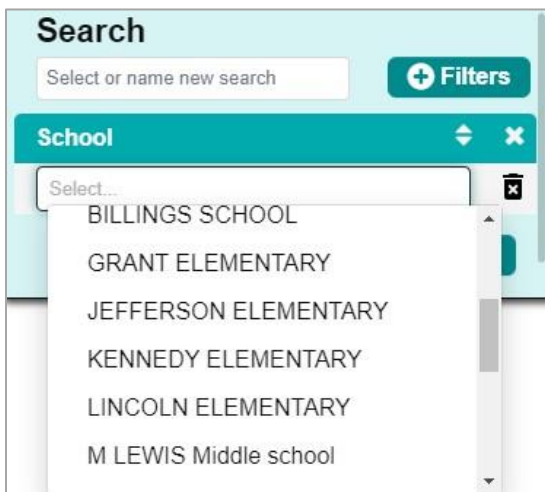
4. School Filter

Select the school filter.



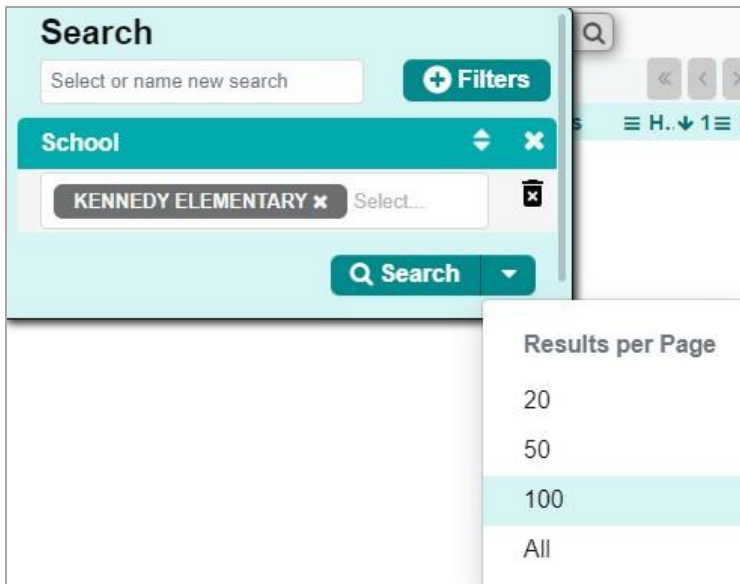
5. Select School

In the search box, select the school.



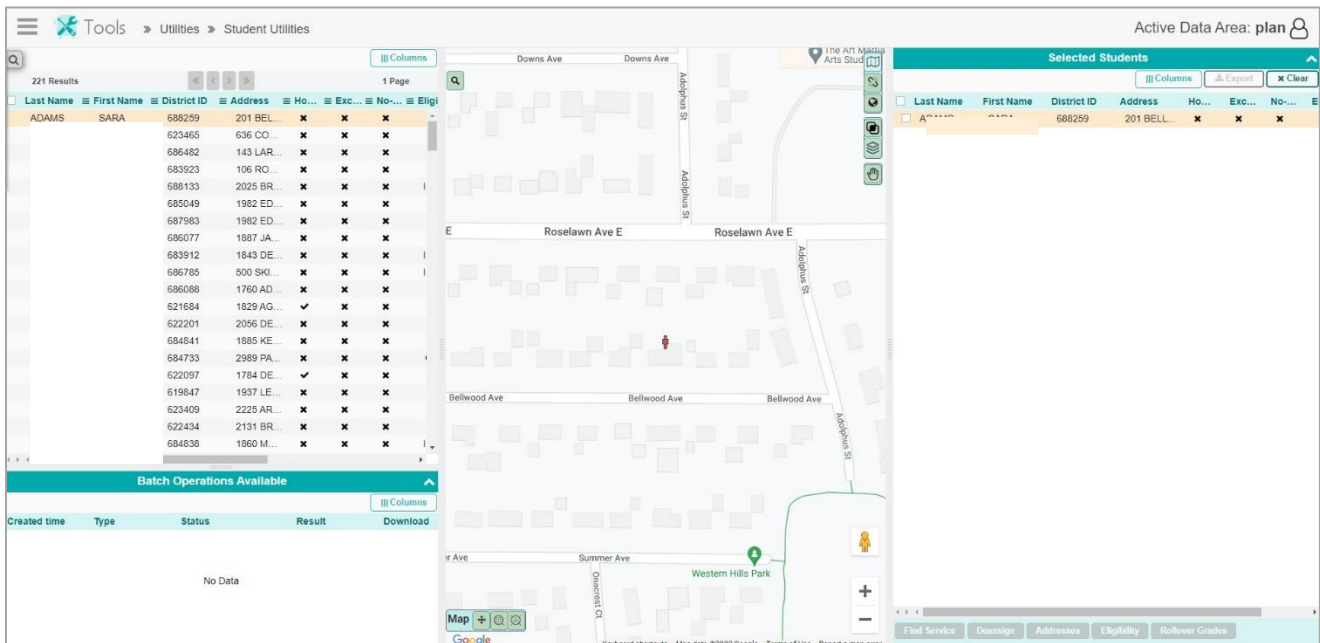
6. Results per Page

Then select 100 in the search drop-down menu. Keep in mind that if you do a batch of over 100, it could take a long time to process.



7. Data Panel

Students will appear in the Data Panel.



8. Select All Students

Select all student by choosing the box at the top of the Data Panel.



Tools > Utilities > Student Utilities

Active Data Area: plan

221 Results

| Last Name | First Name | District ID | Address | Ho... | Exc... | No... | Elig |
|-----------|-------------|-------------|---------|-------|--------|-------|------|
| 688259 | 201 BELL | x | x | x | x | x | x |
| 623465 | 636 COU... | x | x | x | x | x | x |
| 686482 | 143 LAR... | x | x | x | x | x | x |
| 683923 | 106 ROS... | x | x | x | x | x | x |
| 688133 | 2025 BR... | x | x | x | x | x | x |
| 665049 | 1982 ED... | x | x | x | x | x | x |
| 687983 | 1982 ED... | x | x | x | x | x | x |
| 686077 | 1887 JAC... | x | x | x | x | x | x |
| 683912 | 1843 DE... | x | x | x | x | x | x |
| 666785 | 500 SKI... | x | x | x | x | x | x |
| 686088 | 1760 AD... | x | x | x | x | x | x |
| 621684 | 1829 AG... | ✓ | x | x | x | x | x |
| 622201 | 2056 DE... | x | x | x | x | x | x |
| 684841 | 1885 KE... | x | x | x | x | x | x |
| 684733 | 2989 PA... | x | x | x | x | x | x |
| 622097 | 1784 DE... | ✓ | x | x | x | x | x |
| 619847 | 1937 LEE... | x | x | x | x | x | x |
| 623409 | 2225 AR... | x | x | x | x | x | x |
| 622434 | 2131 BR... | x | x | x | x | x | x |
| 684838 | 1860 MC... | x | x | x | x | x | x |
| 621679 | 655 BEL... | x | x | x | x | x | x |
| 686921 | 1708 MC... | x | x | x | x | x | x |
| 685811 | 728 VIKI... | x | x | x | x | x | x |
| 687918 | 436 ELD... | x | x | x | x | x | x |
| 687983 | 2021 ED... | x | x | x | x | x | x |
| 622211 | 2002 LEE... | x | x | x | x | x | x |
| 621682 | 1715 ED... | x | x | x | x | x | x |
| 684919 | 1712 BE... | x | x | x | x | x | x |
| 685624 | 2096 MIS... | x | x | x | x | x | x |

Batch Operations Available

| Created time | Type | Status | Result | Download |
|--------------|------|--------|--------|----------|
| No Data | | | | |

Selected Students

| Last Name | First Name | District ID | Address | Ho... | Exc... | No... | Elig |
|-----------|-------------|-------------|---------|-------|--------|-------|------|
| 688259 | 201 BELL | x | x | x | x | x | x |
| 623465 | 636 COU... | x | x | x | x | x | x |
| 686482 | 143 LAR... | x | x | x | x | x | x |
| 683923 | 106 ROS... | x | x | x | x | x | x |
| 688133 | 2025 BR... | x | x | x | x | x | x |
| 665049 | 1982 ED... | x | x | x | x | x | x |
| 687983 | 1982 ED... | x | x | x | x | x | x |
| 686077 | 1887 JAC... | x | x | x | x | x | x |
| 683912 | 1843 DE... | x | x | x | x | x | x |
| 666785 | 500 SKI... | x | x | x | x | x | x |
| 686088 | 1760 AD... | x | x | x | x | x | x |
| 621684 | 1829 AG... | ✓ | x | x | x | x | x |
| 622201 | 2056 DE... | x | x | x | x | x | x |
| 684841 | 1885 KE... | x | x | x | x | x | x |
| 684733 | 2989 PA... | x | x | x | x | x | x |
| 622097 | 1784 DE... | ✓ | x | x | x | x | x |
| 619847 | 1937 LEE... | x | x | x | x | x | x |
| 623409 | 2225 AR... | x | x | x | x | x | x |
| 622434 | 2131 BR... | x | x | x | x | x | x |
| 684838 | 1860 MC... | x | x | x | x | x | x |
| 621679 | 655 BEL... | x | x | x | x | x | x |
| 686921 | 1708 MC... | x | x | x | x | x | x |
| 685811 | 728 VIKI... | x | x | x | x | x | x |
| 687918 | 436 ELD... | x | x | x | x | x | x |
| 687983 | 2021 ED... | x | x | x | x | x | x |
| 622211 | 2002 LEE... | x | x | x | x | x | x |
| 621682 | 1715 ED... | x | x | x | x | x | x |
| 684919 | 1712 BE... | x | x | x | x | x | x |
| 685624 | 2096 MIS... | x | x | x | x | x | x |

9. Workspace Panel

Then select all students in the workspace panel.

Tools > Utilities > Student Utilities

Active Data Area: plan

221 Results

Last Name

| Last Name | First Name | District ID | Address | Ho... | Exc... | No... | Elig |
|-----------|--------------|-------------|---------|-------|--------|-------|------|
| 621684 | 1829 AG... | ✓ | x | x | x | x | x |
| 687985 | 1640 ED... | ✓ | x | x | x | x | x |
| 555555 | 1359 Burr... | ✓ | x | x | x | x | x |
| 684164 | 1505 WE... | ✓ | x | x | x | x | x |
| 666666 | 556 Rose... | ✓ | x | x | x | x | x |
| 622097 | 1784 DE... | ✓ | x | x | x | x | x |
| 1234568 | 1775 Des... | ✓ | x | x | x | x | x |
| 687474 | 501 SUM... | ✓ | x | x | x | x | x |
| 169653 | 1551 GR... | ✓ | x | x | x | x | x |
| 687485 | 511 SUM... | ✓ | x | x | x | x | x |
| 620080 | 540 RIPL... | ✓ | x | x | x | x | x |
| 5169653 | 1551 GR... | ✓ | x | x | x | x | x |
| 685035 | 1327 BU... | ✓ | x | x | x | x | x |
| 684618 | 400 KING... | ✓ | x | x | x | x | x |
| 684841 | 1885 KE... | ✓ | x | x | x | x | x |
| 686585 | 1772 AG... | ✓ | x | x | x | x | x |
| 621682 | 1715 ED... | ✓ | x | x | x | x | x |
| 686182 | 1962 PAY... | ✓ | x | x | x | x | x |
| 623647 | 488 SKIL... | ✓ | x | x | x | x | x |

Batch Operations Available

| Created time | Type | Status | Result | Download |
|--------------|------|--------|--------|----------|
| No Data | | | | |

Selected Students

| Last Name | First Name | District ID | Address | Ho... | Exc... | No... | Elig |
|-----------|--------------|-------------|---------|-------|--------|-------|------|
| 621684 | 1829 AG... | ✓ | x | x | x | x | x |
| 687985 | 1640 ED... | ✓ | x | x | x | x | x |
| 555555 | 1359 Burr... | ✓ | x | x | x | x | x |
| 684164 | 1505 WE... | ✓ | x | x | x | x | x |
| 666666 | 556 Rose... | ✓ | x | x | x | x | x |
| 622097 | 1784 DE... | ✓ | x | x | x | x | x |
| 1234568 | 1775 Des... | ✓ | x | x | x | x | x |
| 687474 | 501 SUM... | ✓ | x | x | x | x | x |
| 169653 | 1551 GR... | ✓ | x | x | x | x | x |
| 687485 | 511 SUM... | ✓ | x | x | x | x | x |
| 620080 | 540 RIPL... | ✓ | x | x | x | x | x |
| 5169653 | 1551 GR... | ✓ | x | x | x | x | x |
| 685035 | 1327 BU... | ✓ | x | x | x | x | x |
| 684618 | 400 KING... | ✓ | x | x | x | x | x |
| 684841 | 1885 KE... | ✓ | x | x | x | x | x |
| 686585 | 1772 AG... | ✓ | x | x | x | x | x |
| 621682 | 1715 ED... | ✓ | x | x | x | x | x |
| 686182 | 1962 PAY... | ✓ | x | x | x | x | x |
| 623647 | 488 SKIL... | ✓ | x | x | x | x | x |
| 685761 | 342 COU... | ✓ | x | x | x | x | x |
| 688254 | 319 LAR... | ✓ | x | x | x | x | x |
| 688255 | 2196 DE... | ✓ | x | x | x | x | x |
| 686486 | 1860 MC... | ✓ | x | x | x | x | x |
| 683745 | 121 SUM... | ✓ | x | x | x | x | x |
| 621672 | 1790 DE... | ✓ | x | x | x | x | x |
| 622697 | 1941 AR... | ✓ | x | x | x | x | x |
| 687139 | 2175 AR... | ✓ | x | x | x | x | x |
| 665506 | 1715 ED... | ✓ | x | x | x | x | x |

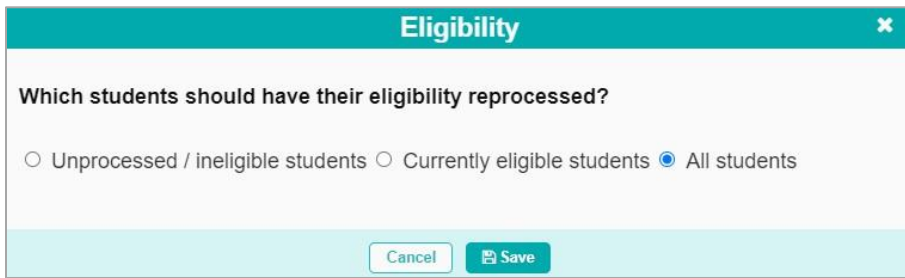
10. Eligibility

At the bottom of the Workspace, select the Eligibility button.



11. Eligible Students

12. Eligibility window will open. Select which student trips should be updated. Then select Save.



Eligibility

Which students should have their eligibility reprocessed?

Unprocessed / ineligible students Currently eligible students All students

Cancel Save

- Be sure to do this process for each page of students until complete.

Find Service for Students

As a Transportation Administrator, I would like to find service for eligible students.

- **Tools**

Once logged in, go to Tools on the Home Page.



- **Student Utilities**

In the Action Bar, select the Student Utilities Module.



- **Select Students**

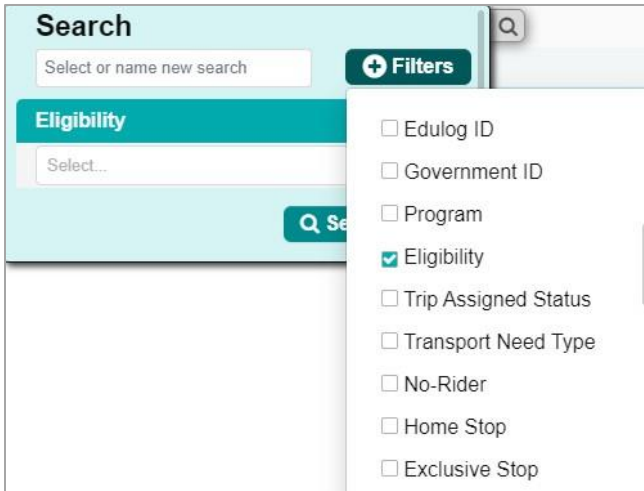
At the top of the module, be sure to select Students.



Students Inactive Students

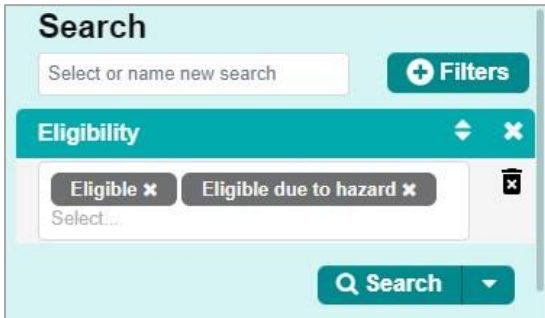
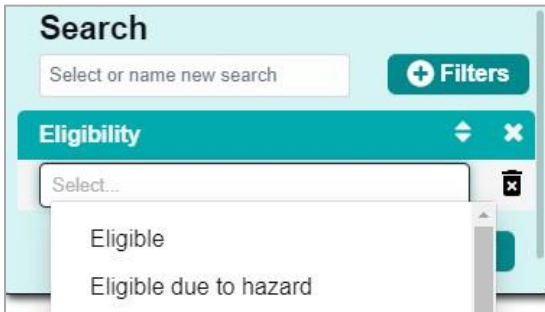
- **Eligibility Filter**

In the search tray, click on the Filters button and select Eligibility.



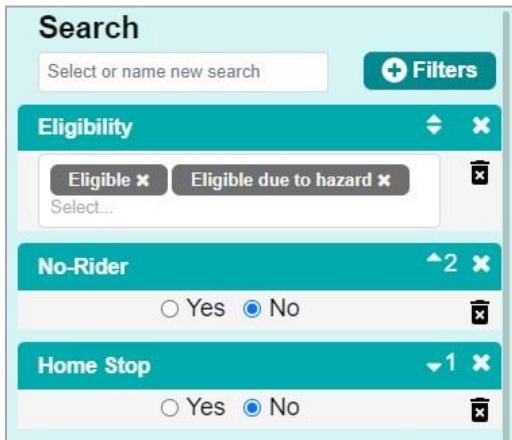
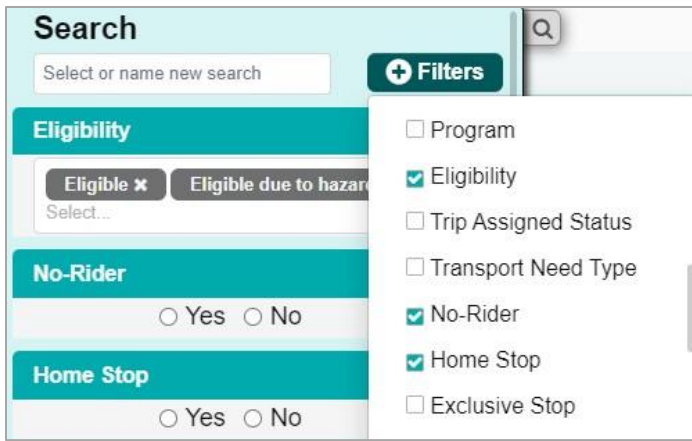
- **Select in Dropdown**

Select Eligible and Eligible due to hazard in the search field drop down.



- **Select No-Rider and Home Stop**

Then select No Rider and Home Stop.



- **Results per Page**

Then select the Results per page by clicking on the down arrow next to the search button. It is recommended to only select 100 per page or less.

Search

Select or name new search + Filters

Eligibility x

Eligible x Eligible due to hazard x

Select...

No-Rider ^2 x

Yes No x

Home Stop v1 x

Yes No x

Q Search v

Results per Page

20

50

100

All

- Data Panel**

Students will appear in the Data Panel. Select all students.

Tools > Utilities > Student Utilities Active Data Area: plan

10000 Results 500 Pages

| Last Name | First Name | District ID | Address | Ho... | Exc... | No... | Elig |
|-----------|-------------|-------------|---------|-------|--------|-------|------|
| 239485 | 7123 TH... | x | x | x | x | x | x |
| 367734 | 2022 CO... | x | x | x | x | x | x |
| 228981 | 7912 RIL... | x | x | x | x | x | x |
| 247925 | 4507 W H... | x | x | x | x | x | x |
| 116645 | 1720 TO... | x | x | x | x | x | x |
| 333019 | 1808 SC... | x | x | x | x | x | x |
| 363432 | 311 S RO... | x | x | x | x | x | x |
| 345778 | 6200 GAL... | x | x | x | x | x | x |
| 167633 | 3300 STE... | x | x | x | x | x | x |
| 309523 | 2004 AUT... | x | x | x | x | x | x |
| 227552 | 1388 MIL... | x | x | x | x | x | x |
| 204282 | 620 PEP... | x | x | x | x | x | x |
| 69666 | 9111 S P... | x | x | x | x | x | x |
| 212508 | 6912 CA... | x | x | x | x | x | x |
| 185179 | 3002 LAU... | x | x | x | x | x | x |
| 108113 | 3206 AR... | x | x | x | x | x | x |
| 278581 | 608 JON... | x | x | x | x | x | x |
| 399378 | 704 DEE... | x | x | x | x | x | x |
| 361628 | 3206 HA... | x | x | x | x | x | x |
| 303950 | 307 WINT... | x | x | x | x | x | x |

Batch Operations Available

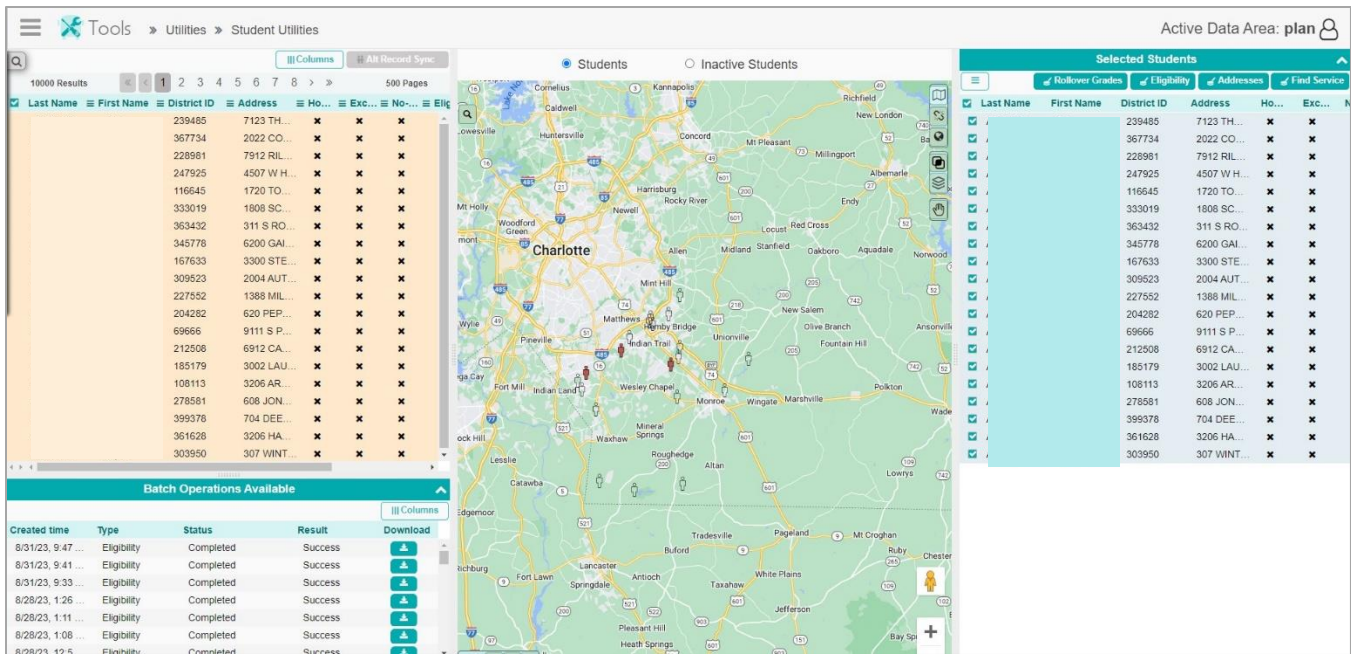
| Created time | Type | Status | Result | Download |
|-------------------|-------------|-----------|---------|----------|
| 8/31/23, 9:47 ... | Eligibility | Completed | Success | Download |
| 8/31/23, 9:41 ... | Eligibility | Completed | Success | Download |
| 8/31/23, 9:33 ... | Eligibility | Completed | Success | Download |
| 8/28/23, 1:26 ... | Eligibility | Completed | Success | Download |
| 8/28/23, 1:11 ... | Eligibility | Completed | Success | Download |
| 8/28/23, 1:08 ... | Eligibility | Completed | Success | Download |

Selected Students

| Last Name | First Name | District ID | Address | Ho... | Exc... |
|-----------|-------------|-------------|---------|-------|--------|
| 239485 | 7123 TH... | x | x | x | x |
| 367734 | 2022 CO... | x | x | x | x |
| 228981 | 7912 RIL... | x | x | x | x |
| 247925 | 4507 W H... | x | x | x | x |
| 116645 | 1720 TO... | x | x | x | x |
| 333019 | 1808 SC... | x | x | x | x |
| 363432 | 311 S RO... | x | x | x | x |
| 345778 | 6200 GAL... | x | x | x | x |
| 167633 | 3300 STE... | x | x | x | x |
| 309523 | 2004 AUT... | x | x | x | x |
| 227552 | 1388 MIL... | x | x | x | x |
| 204282 | 620 PEP... | x | x | x | x |
| 69666 | 9111 S P... | x | x | x | x |
| 212508 | 6912 CA... | x | x | x | x |
| 185179 | 3002 LAU... | x | x | x | x |
| 108113 | 3206 AR... | x | x | x | x |
| 278581 | 608 JON... | x | x | x | x |
| 399378 | 704 DEE... | x | x | x | x |
| 361628 | 3206 HA... | x | x | x | x |
| 303950 | 307 WINT... | x | x | x | x |

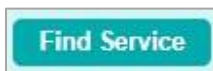
- Workspace Panel**

Then select all students in the Workspace Panel.



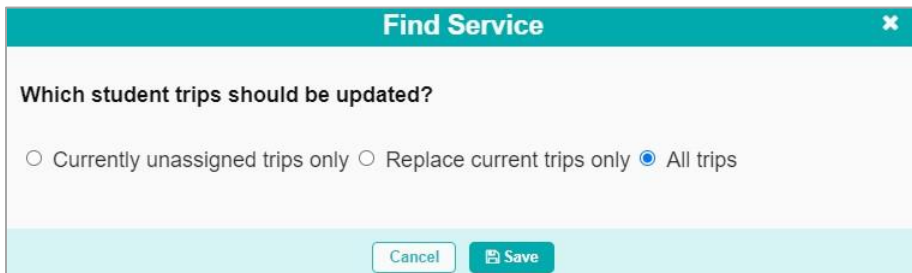
- **Find Service**

At the bottom of the Work Space, select Find Service



- **Update Trips**

The Find Service window will open. Select which student trips should be updated. Then select Save.



- Repeat this process for each page of students.

Address Match Unmatched Students

As a Transportation Administrator, I would like to address match all unmatched students.

1. Tools

Once logged in, go to Tools on the Home Page.



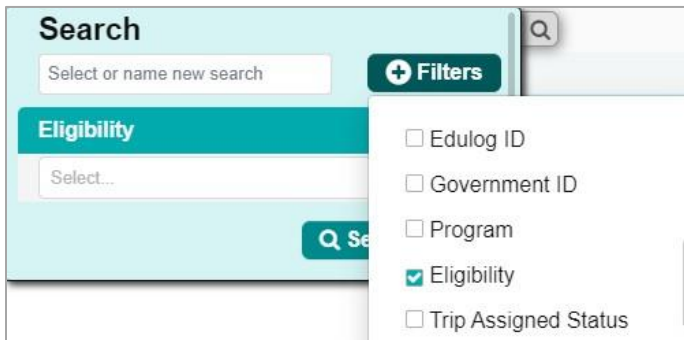
2. Student Utilities

In the Action Bar, select the Student Utilities Module.



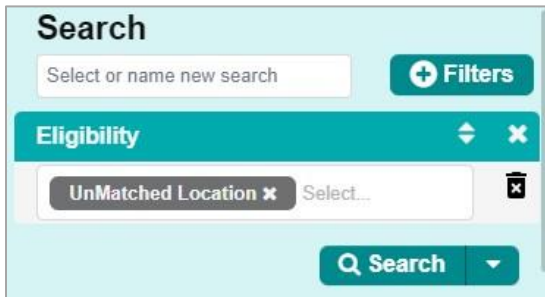
3. Eligibility Filter

Select the Eligibility filter.



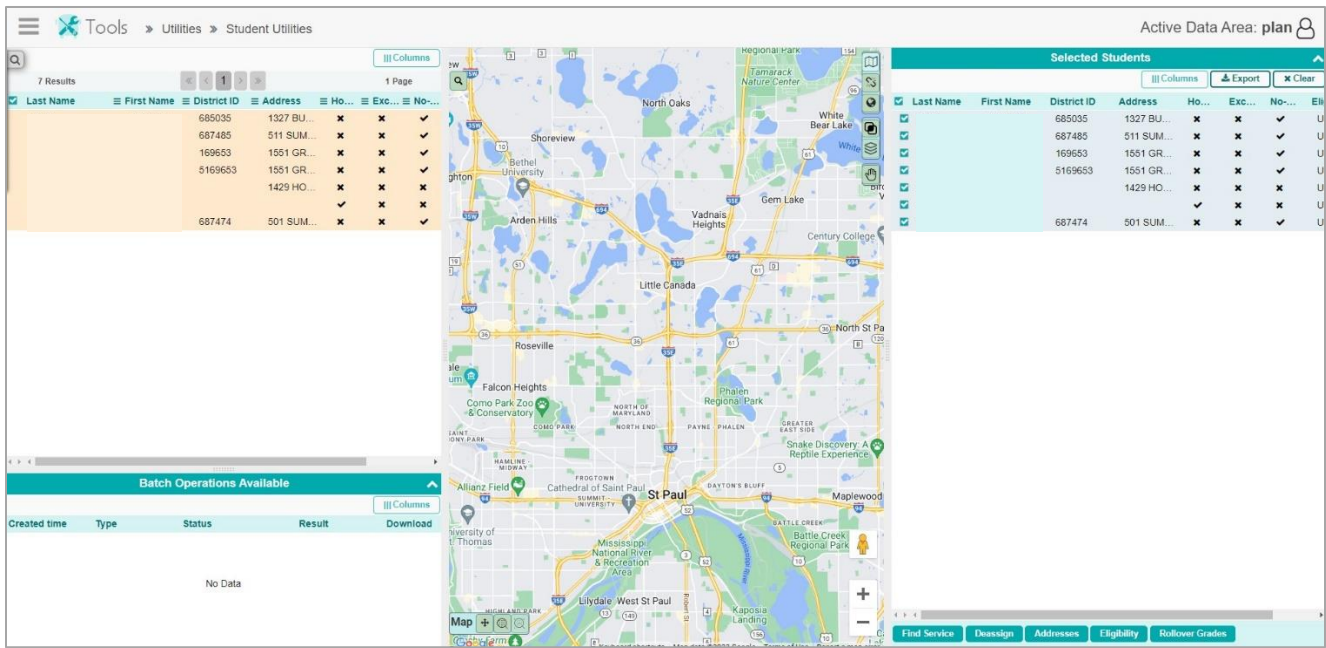
4. Unmatched Location

Then select Unmatched Location.



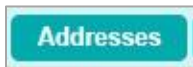
5. Workspace Panel

Select all students in the Data Panel and in the Workspace Panel.



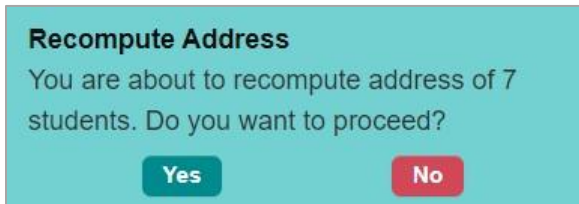
6. Addresses

Then select the Addresses button below.



7. Recompute

The Recompute Address window will open. Select Yes to proceed.



8. Export Option

If any addresses still do not match, you can export the list and take care of them individually in the student file or SIS.



9. Download

The list will download to your computer downloads folder and you can open it from there.

| | A | B | C | D | E | F | G | H | I |
|---|-----------|------------|-------------|---------|----------|-----------|----------|--------------------|---|
| 1 | Last Name | First Name | District ID | Address | Home Sto | Exclusive | No-Rider | Eligibility | |
| 2 | | | 685035 | | FALSE | FALSE | FALSE | UnMatched Location | |
| 3 | | | 687485 | | FALSE | FALSE | FALSE | UnMatched Location | |
| 4 | | | 169653 | | FALSE | FALSE | FALSE | UnMatched Location | |
| 5 | | | 5169653 | | FALSE | FALSE | FALSE | UnMatched Location | |

School, Grade, Program

As a Transportation Administrator, I would like to batch change the school, grade, and program for a group of students. In this example, a group of students are moving from one tech school to another tech school.

- **Tools**

Once logged in, go to Tools on the Home Page.



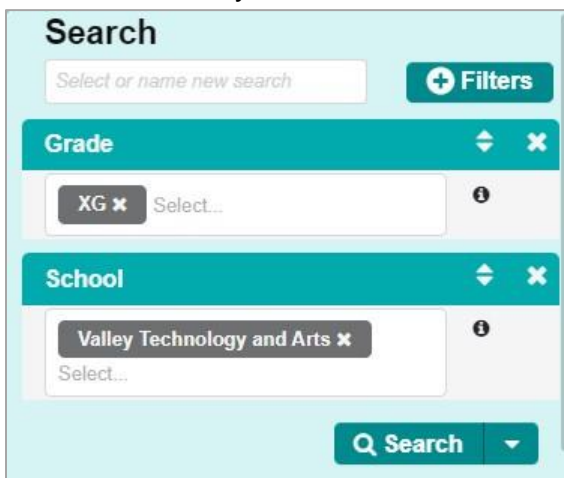
- **Student Utilities**

In the Action Bar, select the Student Utilities Module.



- **Search Tray**

In the search tray, search for the students you want to change.



- **Data Panel**

Select the students in the data panel, and then select them in the workspace panel.

The screenshot shows the 'Student Utilities' interface. On the left, there is a table with columns for Last Name, First Name, District ID, and Address. Below this is a 'Batch Operations Available' table with columns for Created time, Type, Status, Result, and Download. In the center is a map of Charlotte, North Carolina, with red pins indicating student locations. On the right, there is a 'Selected Students' table with columns for Last Name, First Name, District ID, School, and Grade.

- **SGP**

Then select the School, Grade, Program button.



- **Batch Change SGP**

The Batch Change School Grade Program window will open.

The 'Batch Change School Grade Program' window is shown. It has a teal header with the title and a close button. Below the header are three dropdown menus for 'School', 'Grade', and 'Program'. Underneath these is the text 'Do you want to perform Find Service for:' followed by three radio button options: 'Assigned Trips', 'Unassigned Trips', and 'All Trips'. At the bottom, there are three buttons: 'Cancel', 'Clear Option', and 'Save'.

- **Select SGP**

Select the School, Grade and Program from the dropdown menu and make a selection under Do

you want to perform Find Service for:

Batch Change School Grade Program ✕

School
Teton Technology and Arts ▼

Grade
XG ▼

Program
DFLT ▼

Do you want to perform Find Service for:

Assigned Trips

Unassigned Trips

All Trips

Cancel Clear Option Save

- Once you have made your selections, click on Save.

Rematch Address

As a Transportation Administrator, I would like to address match all unmatched students.

1. Eligibility Filter

Select the Eligibility filter.

Search

Select or name new search

Filters

Eligibility

Select...

Edulog ID

Government ID

Program

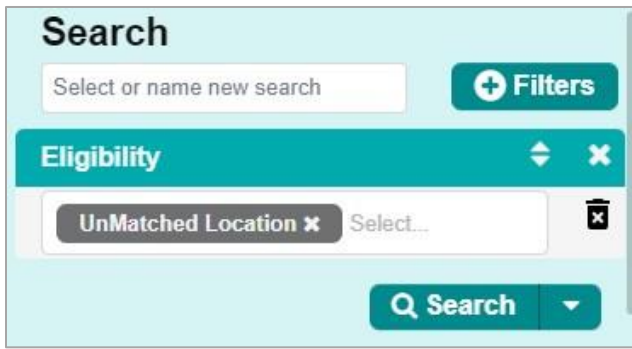
Eligibility

Trip Assigned Status

Q Search

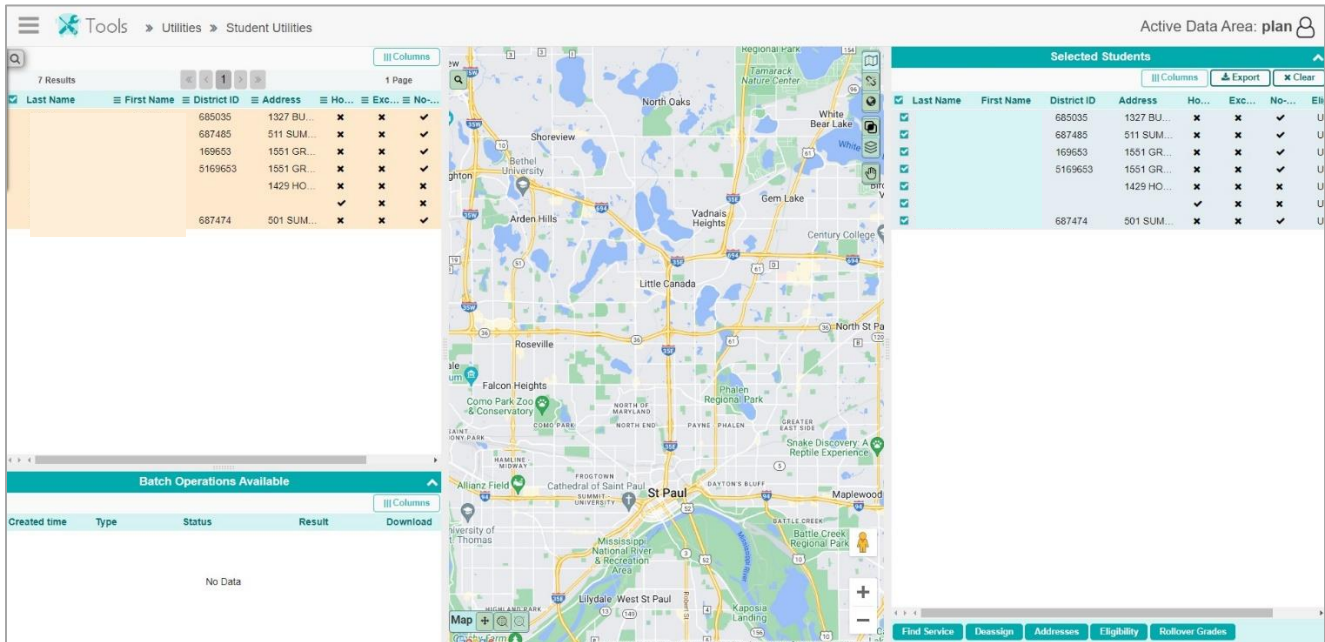
2. Search

Choose the eligibility and then search.



3. Select Students

Select all students in the Data Panel and in the Workspace Panel.



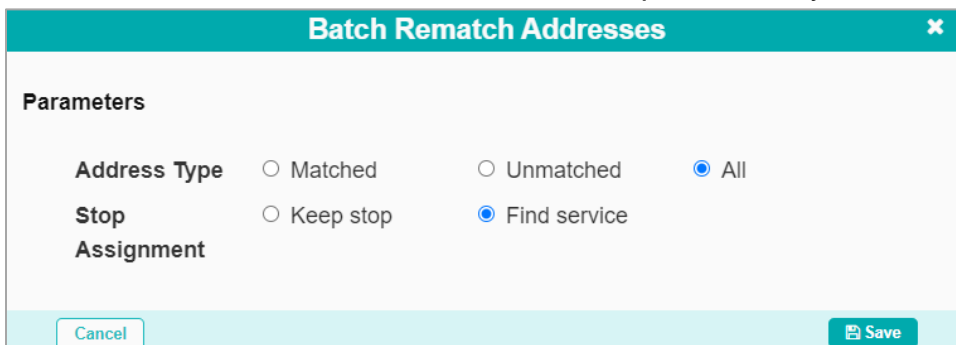
4. Rematch Addresses

Then select the Addresses button below.



5. Batch Rematch Addresses

The Batch Rematch Addresses window will open. Select your Parameters and then click on Save.



Deactivate Students

As a Transportation Administrator, I would like to deactivate a group of students.

1. Search

In the search tray, select your filters and click on Search.

The search interface includes a search bar with the placeholder text "Select or name new search" and a "Filters" button. Below the search bar, there are two filter sections: "Grade" and "School". The "Grade" filter is set to "XG" and the "School" filter is set to "Valley Technology and Arts". A "Search" button is located at the bottom right of the filter section.

2. Select Students

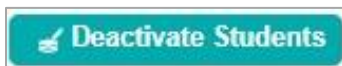
Select the students in the data panel, and then select them in the workspace panel.

The screenshot shows the student management interface. On the left, there is a list of 88 results with columns for Last Name, First Name, District ID, and Address. Below the list is a "Batch Operations Available" table. In the center, there is a map of Charlotte, NC, with red pins indicating student locations. On the right, there is a "Selected Students" panel with columns for Last Name, First Name, District ID, School, and Grade. The "Active Data Area: plan" is indicated in the top right corner.

| Created time | Type | Status | Result | Download |
|-----------------|-------------|-----------|---------|----------|
| 8/31/23, 9:4... | Eligibility | Completed | Success | |
| 8/31/23, 9:4... | Eligibility | Completed | Success | |
| 8/31/23, 9:3... | Eligibility | Completed | Success | |
| 8/28/23, 1:2... | Eligibility | Completed | Success | |
| 8/28/23, 1:1... | Eligibility | Completed | Success | |
| 8/28/23, 1:0... | Eligibility | Completed | Success | |

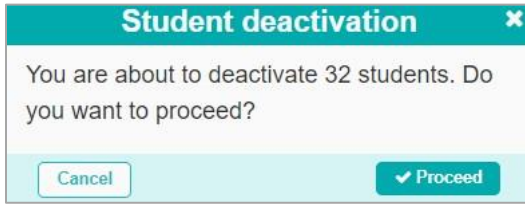
3. Deactivate Students

Then select the Deactivate Students button.



4. Student Deactivation

A Student deactivation confirmation window will appear, select Proceed.

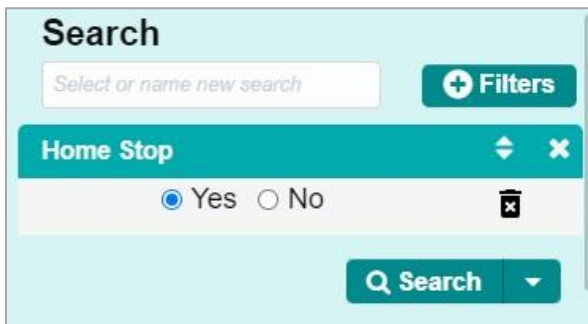


Stop Duration

As a Transportation Administrator, I would like to.

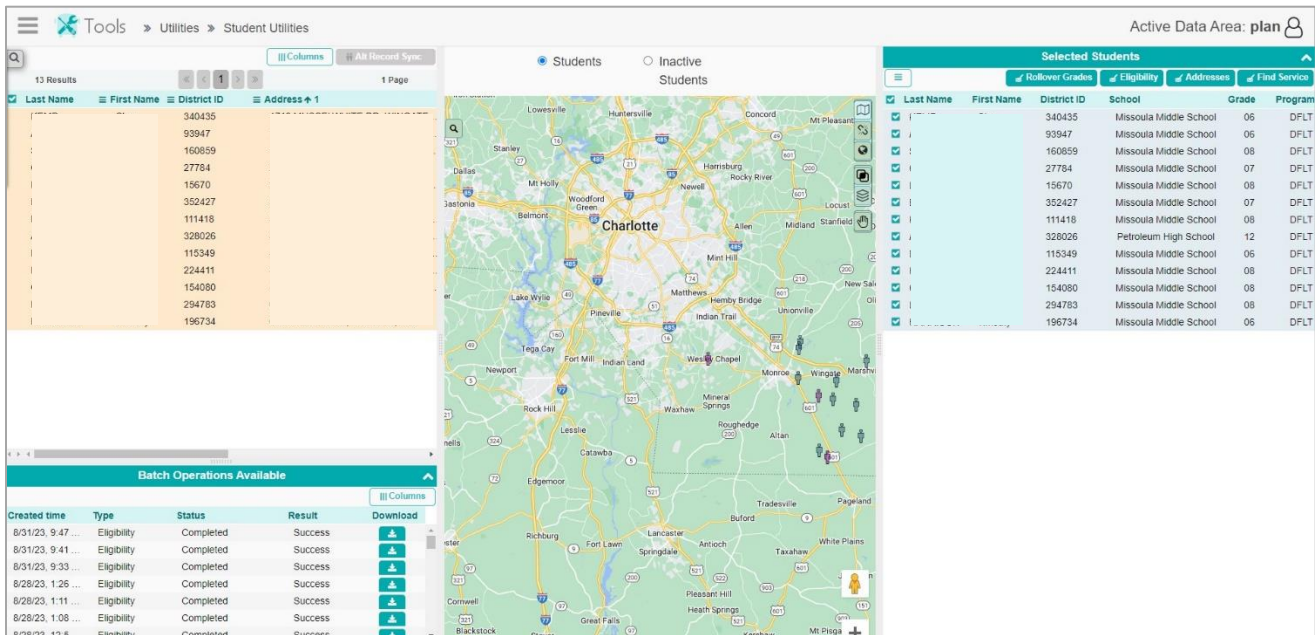
1. Search

In the search tray, select your filter parameters. Then click on Search.



2. Select Students

Select the students in the data panel, and then select them in the workspace panel.



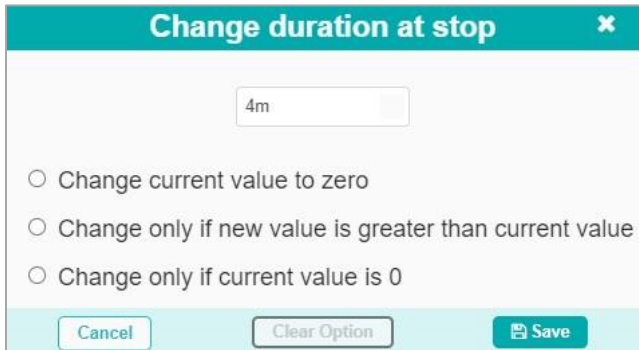
3. Stop Duration

Then select the Stop Duration button.



4. Change Duration at Stop

The Change duration at stop window will open. Add the stop duration or select from the list of options, and click on Save.

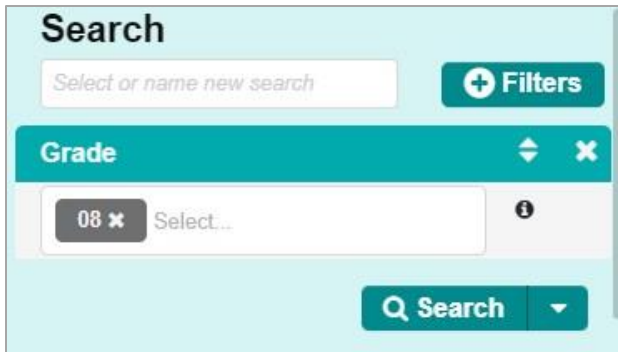


Rollover Grades

As a Transportation Administrator, I would like to rollover grades from the previous year.

1. Search

Select the grade filter and then choose your grade.



2. Select Students

Select the students in the data panel, and then select them in the workspace panel.

The screenshot shows a software interface with a map of Charlotte, NC, and a list of students. The interface includes a search bar, a list of 2870 results, a map, and a 'Selected Students' table.

| Last Name | First Name | District ID | School | Grade | Program |
|-----------|------------|-------------|------------------------|-------|---------|
| 122451 | | | McCone Middle School | 06 | DF |
| 70696 | | | Mineral Middle School | 06 | DF |
| 139189 | | | Park Middle School | 06 | DF |
| 301723 | | | Park Middle School | 06 | DF |
| 233537 | | | Liberty Middle School | 06 | DF |
| 343772 | | | Lincoln Middle School | 06 | DF |
| 222130 | | | McCone Middle School | 06 | DF |
| 227467 | | | Mineral Middle School | 06 | DF |
| 150253 | | | Park Middle School | 06 | DF |
| 41832 | | | Meagher Middle School | 06 | DF |
| 193914 | | | Meagher Middle School | 06 | DF |
| 342102 | | | Madison Middle School | 06 | DF |
| 22878 | | | Park Middle School | 06 | DF |
| 117015 | | | Mussetshell Middle S. | 06 | DF |
| 170016 | | | Park Middle School | 06 | DF |
| 362223 | | | Mussetshell Middle S. | 06 | DF |
| 138104 | | | Meagher Middle School | 06 | DF |
| 290798 | | | Missoula Middle School | 06 | DF |
| 385258 | | | McCone Middle School | 06 | DF |
| 156122 | | | Missoula Middle School | 06 | DF |
| 258748 | | | Mussetshell Middle S. | 06 | DF |
| 302914 | | | Lincoln Middle School | 06 | DF |
| 340554 | | | Liberty Middle School | 06 | DF |
| 138424 | | | Madison Middle School | 06 | DF |
| 277194 | | | Lincoln Middle School | 06 | DF |
| 266655 | | | Liberty Middle School | 06 | DF |
| 56155 | | | Park Middle School | 06 | DF |
| 183881 | | | Liberty Middle School | 06 | DF |
| 209133 | | | Mussetshell Middle S. | 06 | DF |
| 134555 | | | Lincoln Middle School | 06 | DF |
| 341796 | | | McCone Middle School | 06 | DF |

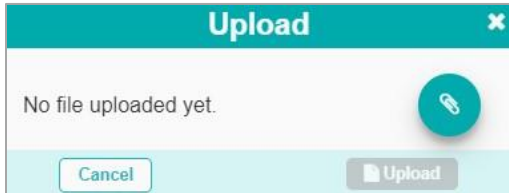
3. Rollover Students

Then select the Rollover Students button.



4. Upload

The upload window will open.



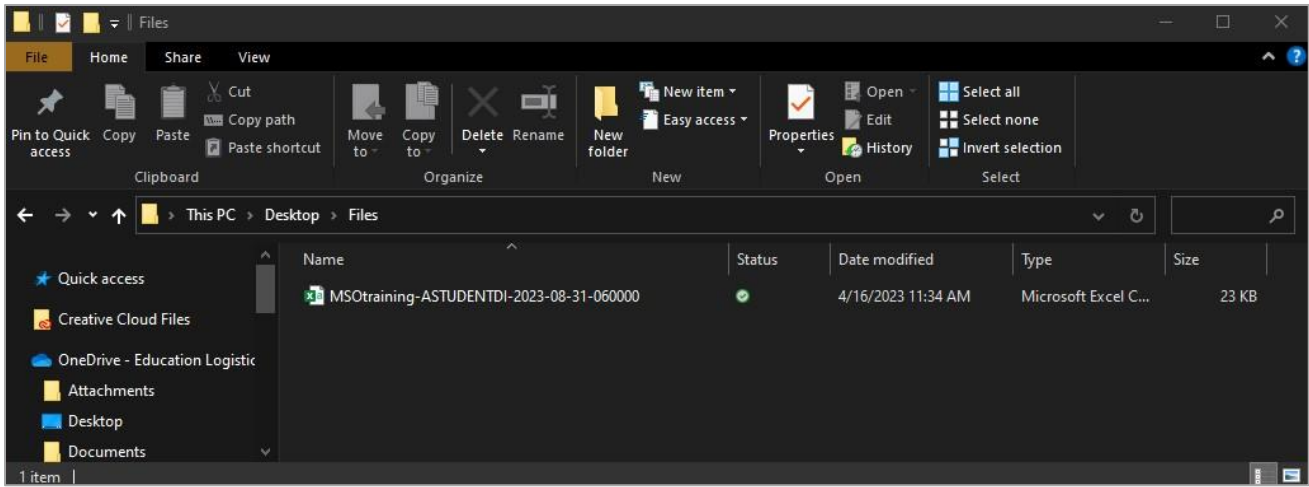
5. To Upload

Select the paperclip icon.



6. Select File

Then select the file on your computer.



7. Select Upload

Then select Upload.

