ATHENA CHECKPOINTS

Education Logistics, Inc.

Training
Guide

2024

Athena Checkpoints
Training Guide

2024 by Education Logistics, Inc

Date Modified: 11.01.2024

Version: 1.67

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
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PURPOSE OF THIS GUIDE

The Athena Checkpoints Training Guide will provide you with explanations of the basic tools within Athena, walk you through the procedure of the Checkpoints Module 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 BELL TIMES MAP ASSET KEY

Symbol	Explanation	Symbol	Explanation
👁	Turn Preview Window ON/OFF	Opt 🔁	Re-sequence Selected Run
	Query Stop and Checkpoint Locations		Create New Transfer Location
	Create New Stop/Checkpoint Location	⤭	Manage Transfer Staging
Runs	Unassign All Stops from Selected Run	⊞	Add Selected Run to Transfer Location
	Create New Run	⊟	Remove Selected Run from Transfer Location
	Delete Selected Run		Tweak Transfer Bell Times
	Checkpoint Location Assigned to a Run		Checkpoint Location Not Assigned to a Run

CHECKPOINTS INTRODUCTION

Information regarding checkpoints can be found in the Data Management area of the actions bar. In this space, you will be able to locate and update all fundamental data associated to checkpoints in Athena:
- Name
- Duration
- Location
- Description
- Runs Using Selected Checkpoint Locations

NAVIGATING THE CHECKPOINTS MODULE

1. **Sign In**
   You will first come to the Sign In page where you will enter your Username (email) and Password.
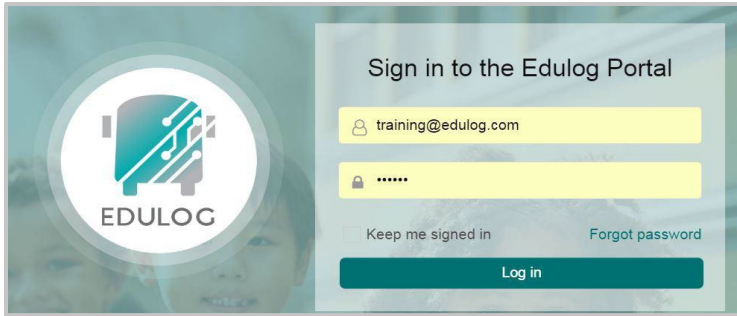
2. **Athena Portal Home Page**
   You will be brought to the Athena Portal Home Page; at the bottom of this screen are the Athena applications.
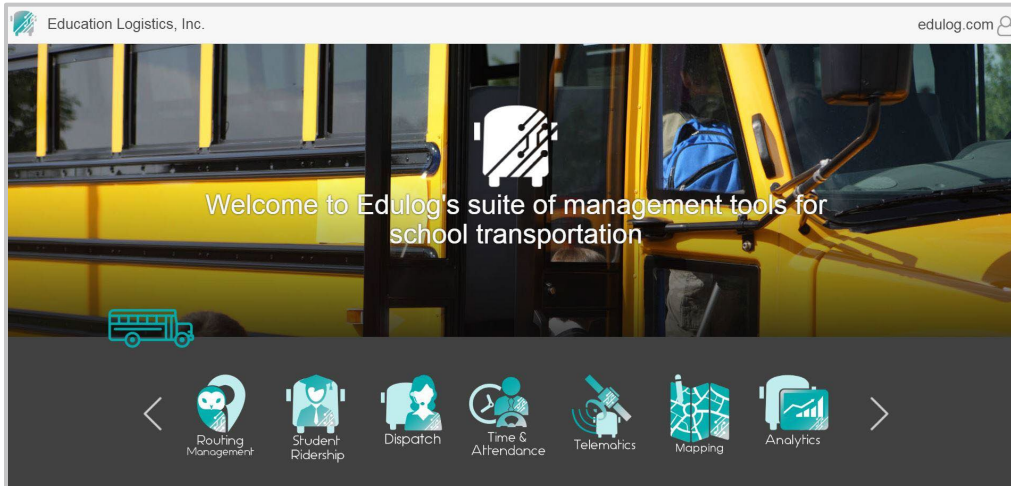
3. **Routing Management**
   Select the owl icon to enter the Routing Management application.

4. **Checkpoints**
   Navigate to "Checkpoints" under "Data Management" in the action bar.
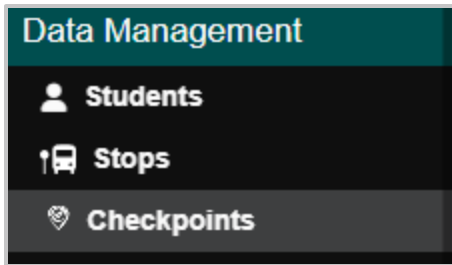
5. Checkpoints Panels

In the Checkpoints Module, there are 3 main panels: the Checkpoints Data Panel, Map Panel, and Checkpoints Workspace Panel.
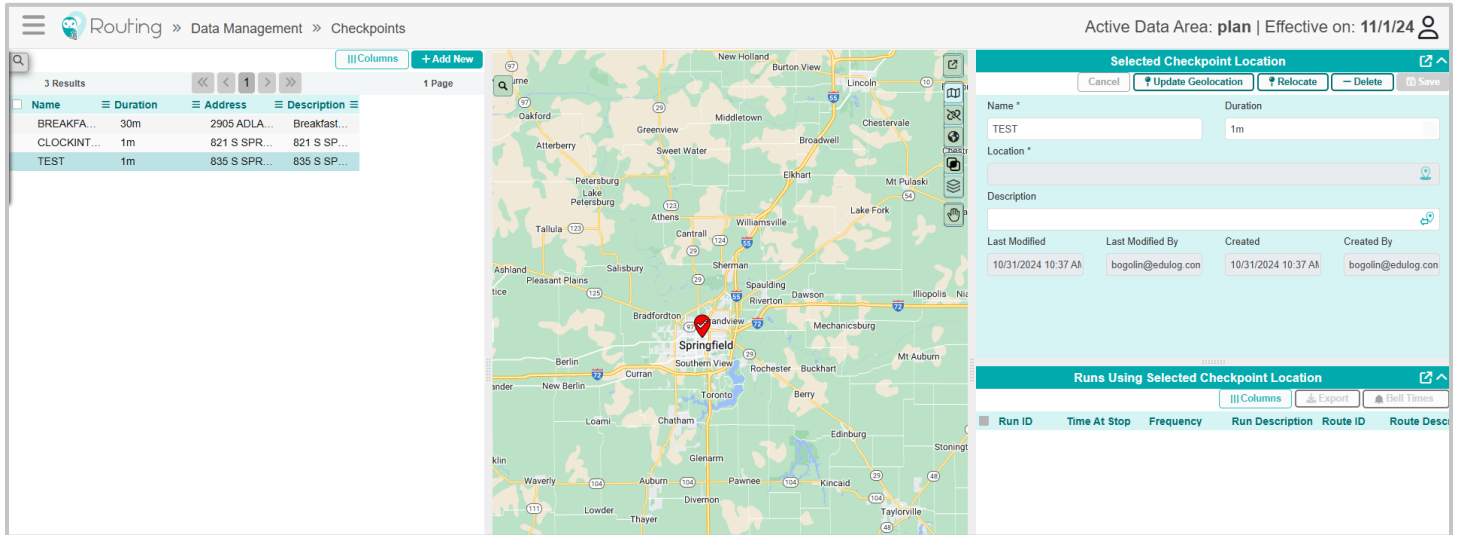
6. Checkpoints Data Panel

The Checkpoints Data Panel is where your Checkpoints are listed.
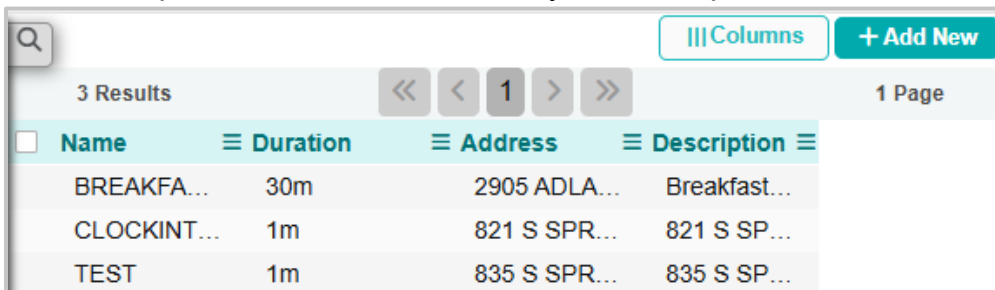
7. Search Window

The Search Window is where you can filter and search specific Checkpoint data.
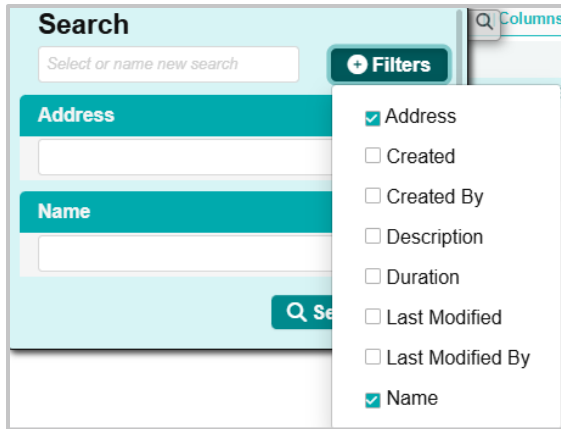
8. Map Panel
The Map Panel is where your selected checkpoints will appear.
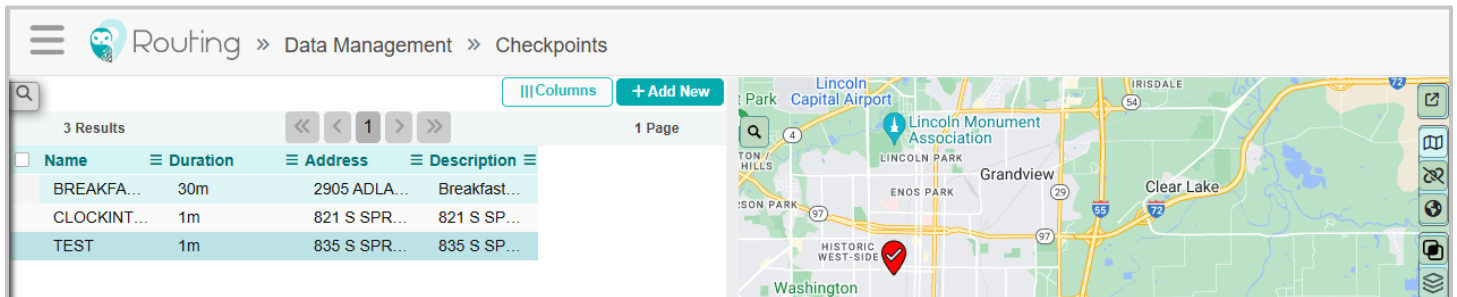
- Hovering over the Checkpoint Icon will bring up the name, address, and duration of the selected checkpoint.
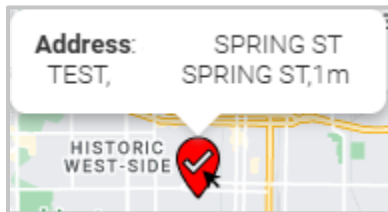
9. Select Checkpoint
When you select a checkpoint, the checkpoint information will appear in the Workspace panel.
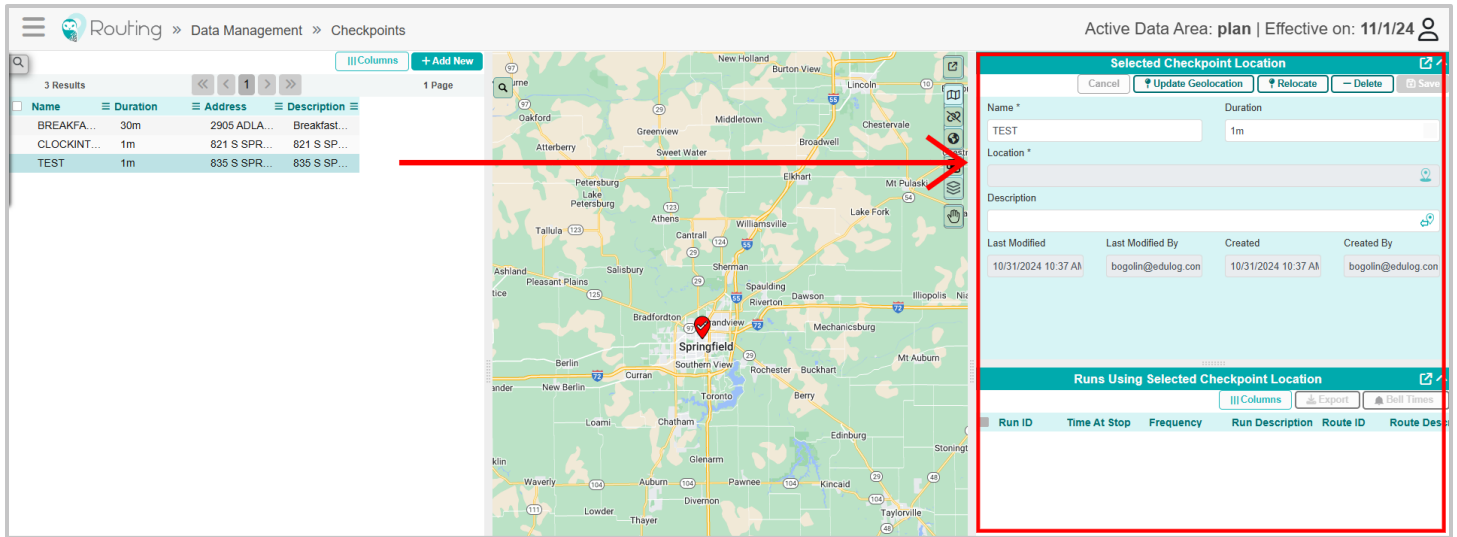
10. Selected Checkpoint Location

When you select a Checkpoint in the data panel, the workspace panel will open to include the "Selected Checkpoint Location" card. Within this card users can:

- Edit/Update Checkpoint information such as,
  - Name
  - Duration
  - Location
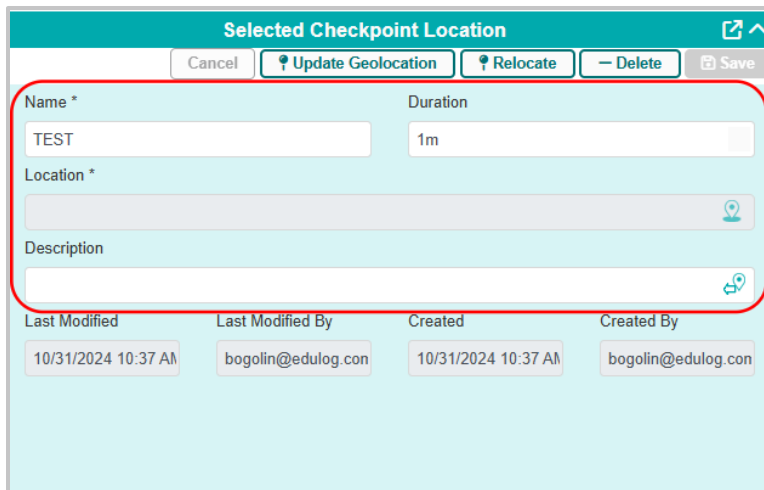
- Update the Geolocation of the selected checkpoint
- Relocate the selected checkpoint
- Delete the selected checkpoint

11. Audit Logs

You can also see the audit log for selected checkpoints.

12. Runs Using Selected Checkpoint Location

If your selected checkpoint is attached to a run, you will see that information populate within the "Runs Using Selected Checkpoint Location" card within the Checkpoints workspace panel.

13. Multi-Checkpoint Locations

One of the potential uses of checkpoints is that you can have multiple checkpoints at the same location, possibly for SPED stop notes on a run, or for clock-in/clock-out notes for drivers.
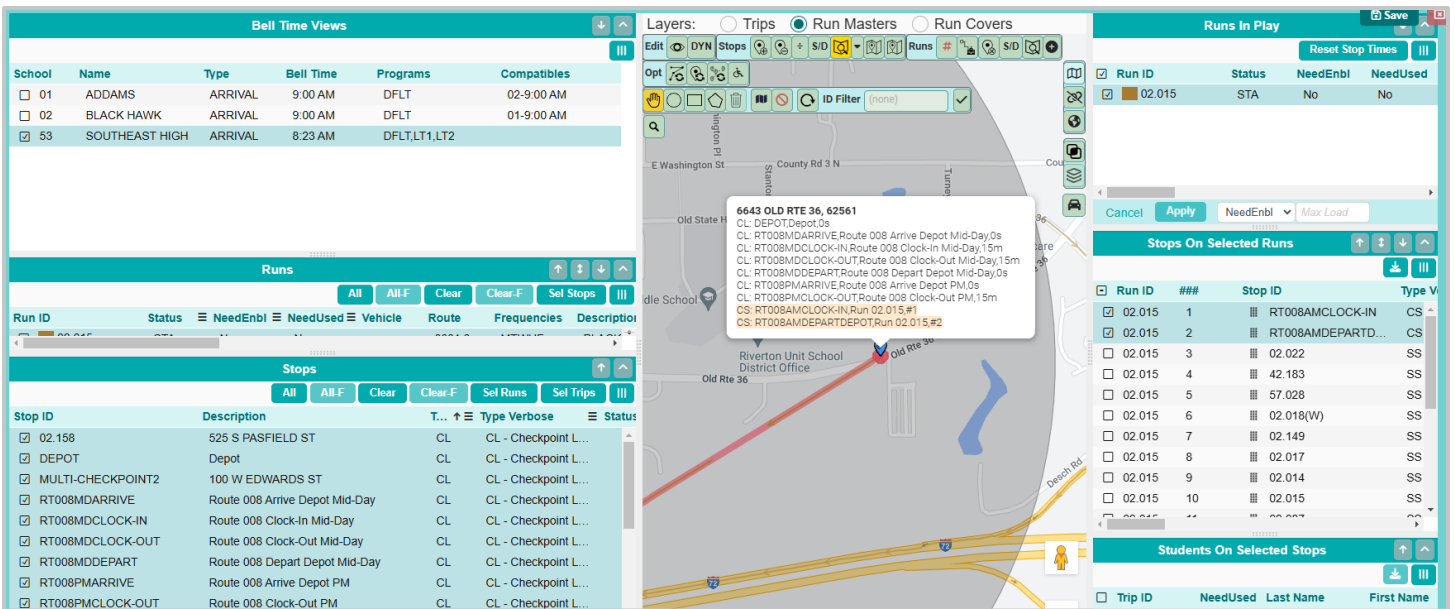
14. Bell Times

Users can update Checkpoints on Runs by using the "Bell Times" modal within the Runs Using Selected Checkpoint Location Card in the Workspace Panel in Data Management > Checkpoints Module.

- Select the run(s) that you would like to edit, then click on the "Bell Times" button.
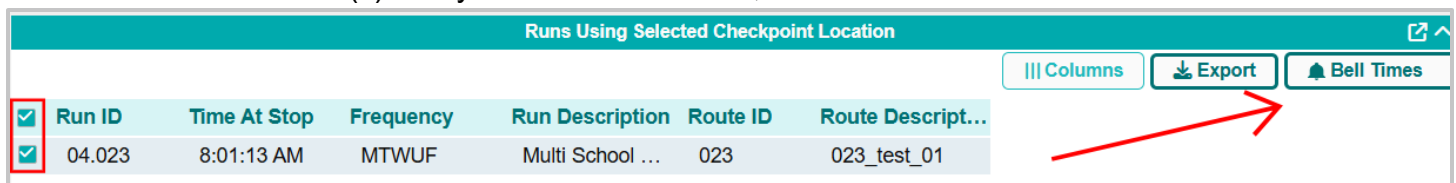
- **Layers:** Navigate to the "Run Masters" Layer.

- **Data Panel:** Includes:
  - **Bell Time Views Card:** Shows the selected school(s)
  - **Runs Card:** Shows the selected run(s)
  - **Stops Card:** Shows the selected checkpoint(s)/stop(s)
- **Map Panel:** Shows the selections from the data panel on the map, which allows users to have a visual representation of current markings, and any changes that are made.
- **Workspace Panel**: Includes:
  - **Runs In Play Card:** Shows the selected run(s), and allows users to Reset Stop Times.
  - **Stops On Selected Runs Card:** Shows all stops on a selected run
  - **Students On Selected Stops Card:** Shows all students on selected stops.
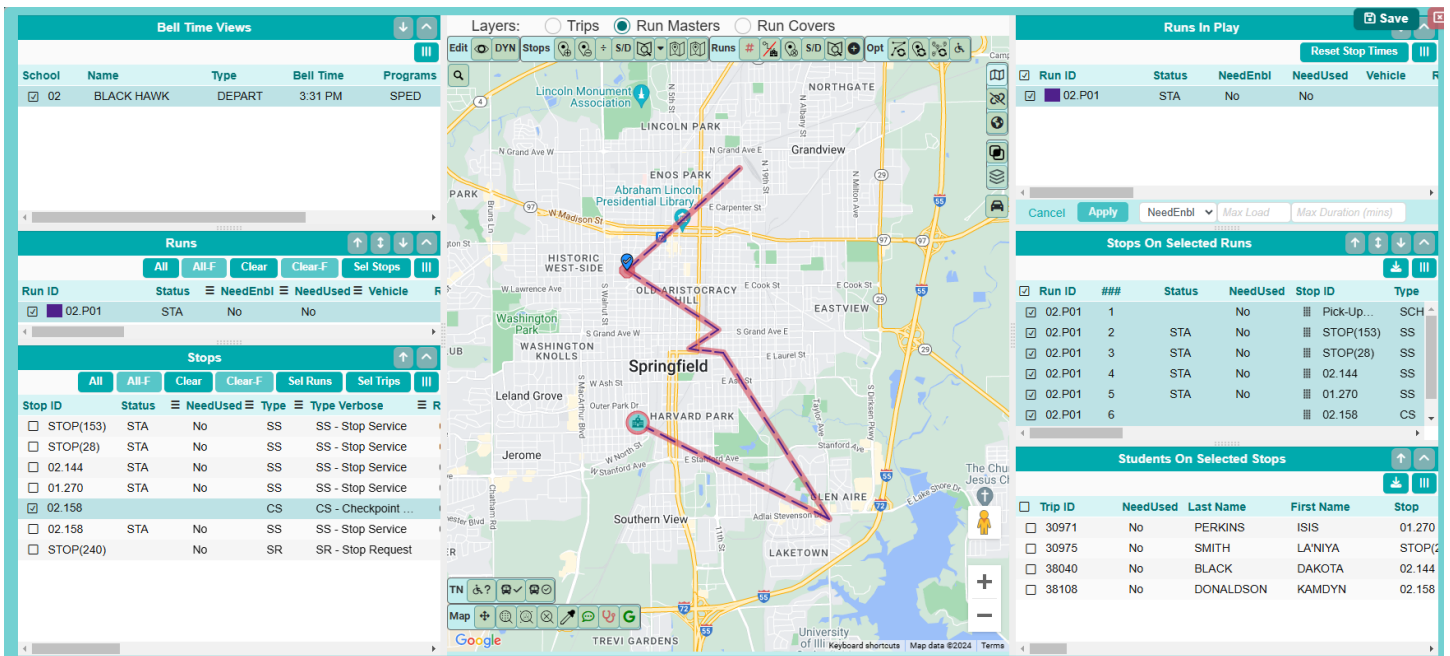
ATHENA CHECKPOINTS USER STORIES

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:

- Adding A New Checkpoint
- Updating Geolocation of a Selected Checkpoint Location
- Relocating a Checkpoint Location
- Using the Bell Times Modal to Add a Checkpoint to a Run

Adding A New Checkpoint

You are a router and need to add a new checkpoint.

Here's How

1. **Routing Management**
   Select the owl icon to enter the Routing Management application.

2. **Checkpoints**
   Navigate to "Checkpoints" under "Data Management" in the action bar.
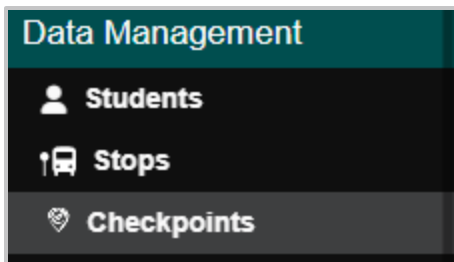
3. **Add New**

   In the Checkpoints data panel, click the "+Add New" button.
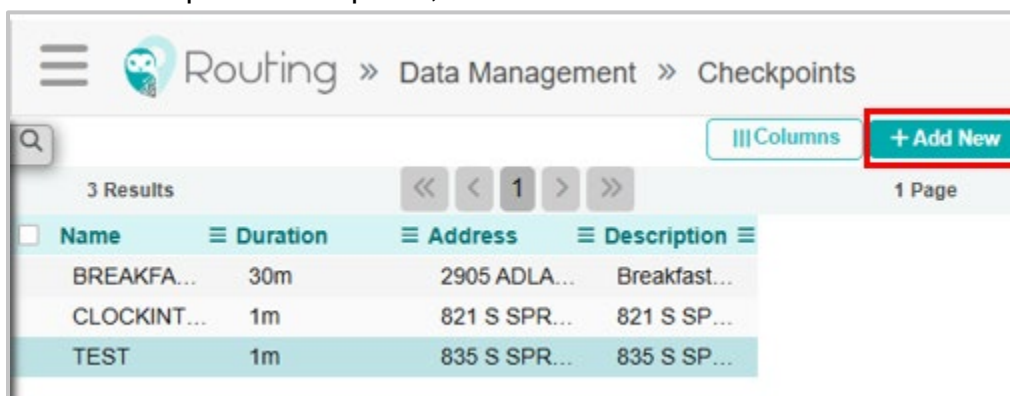
4. **Update Creating Checkpoint Location Card**

   Fill in each field within the "Creating Checkpoint Location" card within the workspace panel.

   Note: "" indicated required field.*

   - **Name:** The Name field is required and should follow each district's naming convention for stop locations.
   - **Duration:** The Duration field can be updated either by hours, minutes, or seconds by clicking on the drop down that appears when clicking into this cell.
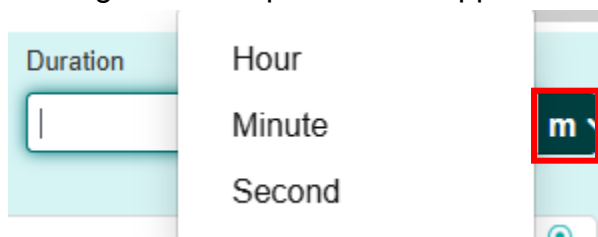
- **Location:** To add a location to the checkpoint, select the location icon, and the "Pick a Location" window will open on your screen. You have the option to manually type in the address, or find the location on the map panel in the pop-out window. Once you have selected the address select "Save", and the address will appear in the location box of the "Stop" card.

- **Description:** Users can update the description of checkpoints, by either typing in a description, or clicking the "Copy Data" button within the description field, to return the Location Address as the Description name.

5. **Save**
   Once each field is filled out, click the "Save" button at the top of the Creating Checkpoint Location Workspace Panel.

Updating Geolocation of a Selected Checkpoint Location

You are a router and need to update the geolocation of a point.

Here's How

1. **Routing Management**
   Select the owl icon to enter the Routing Management application.
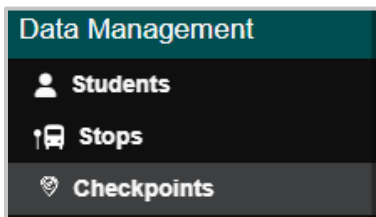
2. **Checkpoints**
   Navigate to "Checkpoints" under "Data Management" in the action bar.

3. **Select Checkpoint**
   In the Data panel, select your checkpoint.

4. Update Geolocation

This tool allows the user to update a checkpoint's geolocation individually or in a batch—this is a tool that will most often be employed following a large-scale map update in Athena. Select the "Update Geolocation" button in the Selected Checkpoint Location card in the Workspace Panel.

A pop-up window will appear asking you to select either or both options: "Address stops without projection" or "Intersection stops without projection." For this example, we will be using the "Address stops without projection" option.

Once your selection is made, click the "Start" button. A separate pop-up window will appear, with a map. If the address you are working with needs to be updated, you will see options to update. If any changes are made, or if you are done verifying the point data for your location,

14

select the "Proceed" button.

Relocating a Checkpoint Location

You are a router and need to relocate the location of a checkpoint.

Here's How

1. **Routing Management**
   Select the owl icon to enter the Routing Management application.

2. **Checkpoints**
   Navigate to "Checkpoints" under "Data Management" in the action bar.

3. Select Checkpoint

In the Data panel, select your checkpoint.

4. Relocate

This tool allows the user to update a checkpoint's location individually or in a batch. Select the "Relocate" button in the Selected Checkpoint Location card in the Workspace Panel. The "Pick a Location" window will pop up, allowing users to update point locations. Below is a list of areas that are helpful to understand when picking a new location:

a. **Map Panel:** The map panel shows the currently selected location

b. **Address:** Address locations can be entered using the selected fields. If an address returns a match, the address will show up in green.

c. **Point Data vs. Google:** Users can select either point data or Google to locate and select points.

d. **Manual Override:** If a point is not showing on the map correctly, but users know the address and location are true on the map, users can select the "Manual Override" button to place that address point on the map.

e. **Save:** Once the address has been matched, users can click "Save" to update locations.
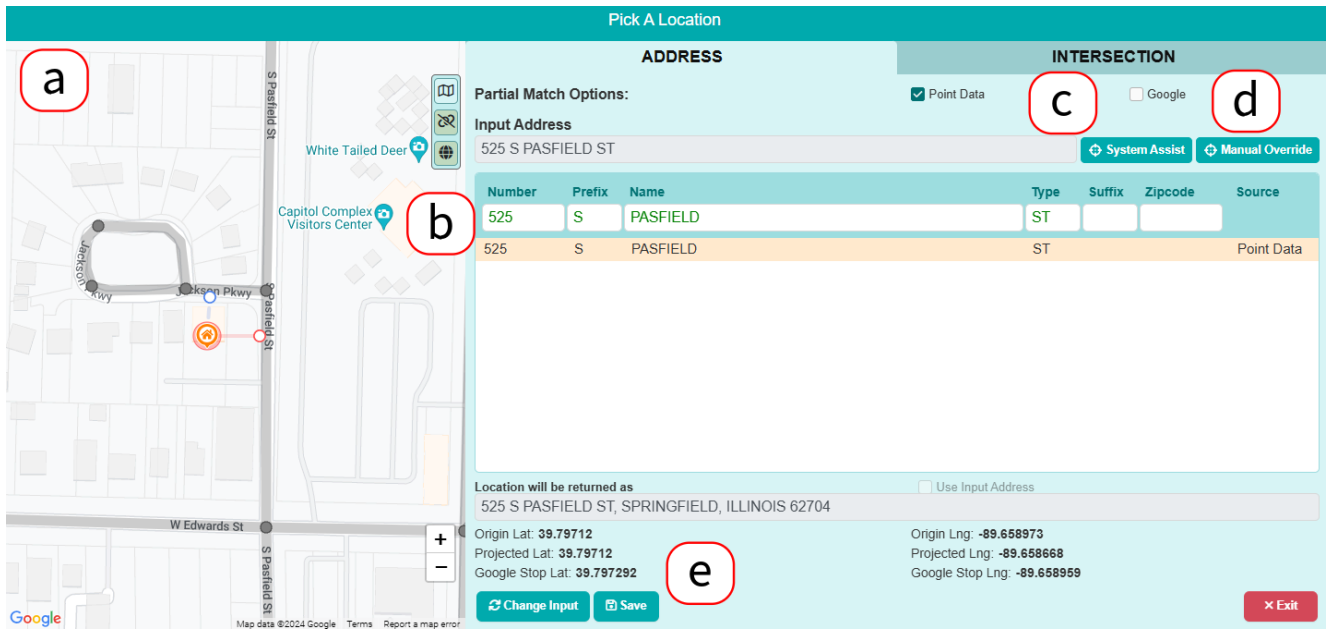
Removing a Checkpoint with the Bell Times Modal

You are a router who has come across a run with an assigned Checkpoint. However, this run should not include a checkpoint location, let's remove it within the Data Management > Checkpoints Module.
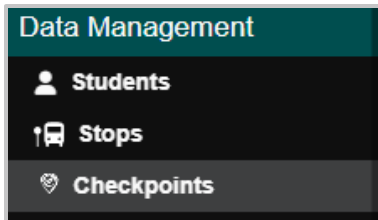
Here's How
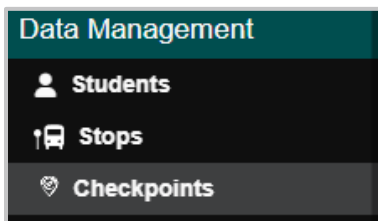
1. **Routing Management**
   Select the owl icon to enter the Routing Management application.

2. **Checkpoints**
   Navigate to "Checkpoints" under "Data Management" in the action bar.

3. **Select Checkpoint**
   In the Data panel, select your checkpoint.

4. Bell Times

Once your run is selected, click the "Bell Times" button in the "Runs Using Selected Checkpoint Location" Card within the Checkpoints Workspace Panel.

5. Layers

Navigate to the "Run Masters" layer.

6. Bell Times Data Panel

The data panel will automatically populate with the school. Select the Run you wish to update within the "Runs" Card within the Data Panel. Next Select the Checkpoint location in the "Stops" card within the Data Panel.

Bell Time Views		↓ ^
		III

School	Name	Type	Bell Time	Programs
☑ 02	BLACK HAWK	DEPART	3:31 PM	SPED

Runs		↑ ↕ ↓ ^
All	All-F	Clear	Clear-F	Sel Stops	III

Run ID	Status	≡ NeedEnbl	≡ NeedUsed	≡ Vehicle	F
☑ 🟥 02.P01	STA	No	No		

Stops		↑ ^
All	All-F	Clear	Clear-F	Sel Runs	Sel Trips	III

Stop ID	Status	≡ NeedUsed	≡ Type	≡ Type Verbose	≡ R
☐ STOP(153)	STA	No	SS	SS - Stop Service	
☐ STOP(28)	STA	No	SS	SS - Stop Service	
☐ 02.144	STA	No	SS	SS - Stop Service	
☐ 01.270	STA	No	SS	SS - Stop Service	
☑ 02.158			CS	CS - Checkpoint …	
☐ 02.158	STA	No	SS	SS - Stop Service	
☐ STOP(240)		No	SR	SR - Stop Request	

- The Run and Checkpoint will display within the Map Panel.
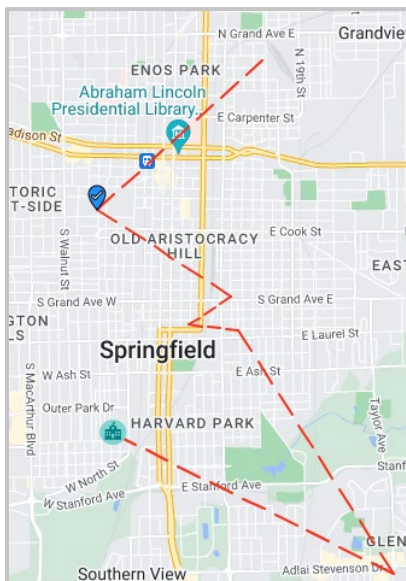
7. **Unassign Checkpoint**

Select the stop within the map panel, a little red circle will appear underneath the checkpoint to indicate that it is selected.
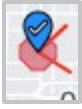
- Once the Checkpoint is selected, use the "Unassign" tool to remove the checkpoint from this run.
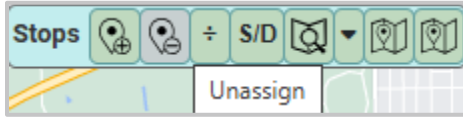
8. Confirm Change

When you click the Unassign tool, a confirmation window will appear. If you would like to continue, click "Proceed".

Confirm this change?

Unassign stop 02.158 from run 02.P01

Before					
☐ Run	Status	Frequency	Load	Duration	Distance
☐ 🟥 02.P01	STA	MTWUF	4		
☐ ▭▭▭		MTWUF	4	53m 12s	14.67 mi

After					
☐ Run	Status	Frequency	Load	Duration	Distance
☐ 🟥 02.P01	STA	MTWUF	4		
☐ ▭▭▭		MTWUF	4	36m 33s	11.31 mi

✓ Proceed   Cancel   Show Maps ⌄
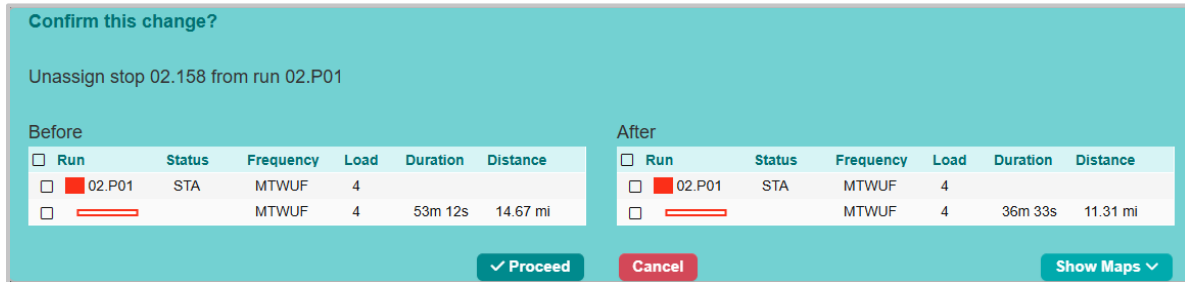
9. Save

Once all of your changes are complete, click the "Save" button at the top right-hand corner of the Bell Times Module.

Runs In Play   🔳 **Save**   ⊠

Reset Stop Times   Ⅲ

☐ Run ID	Status	NeedEnbl	NeedUsed	Vehicle	R
☐ 🟥 02.P01	STA	No	No		

Using the Bell Times Module to Add a Checkpoint to a Run

You are a router that would like to add a checkpoint location to a run using the Bell Times Module.

Here's How

1. Routing Management

Select the owl icon to enter the Routing Management application.

2. Checkpoints

Navigate to "Bell Times" under "Route Planning Operations" in the action bar.
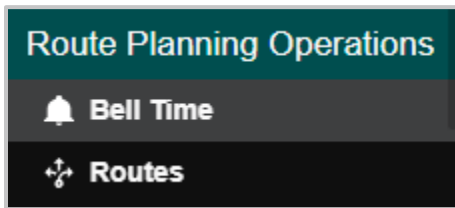
3. Create a Task

Hover over the "+" sign in the lower left of the module and craft an identifiable name for your task—select Create.

4. Augment Context

The Augment Context window will automatically populate following the creation of a task. In this window, choose your School and Bell Times in either the School or Cluster drop down.

- Additionally, select the "Runs to Load", "Stops to Load", and "Trips to Load"—the system will default to ALL.
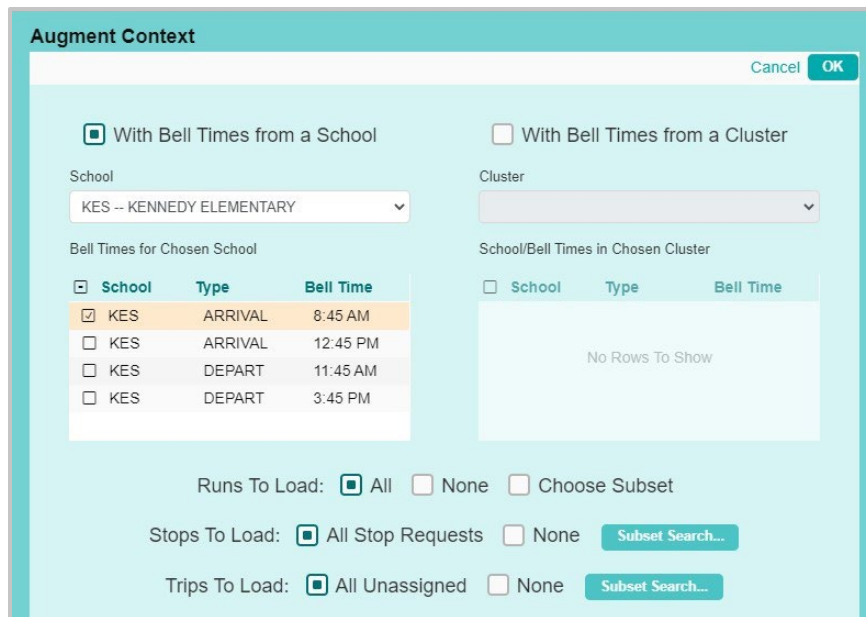
When you have completed your search augmentation, select "OK" in the top right of the window; the Bell Time information for your school will populate in the Data Panel.

5. **Layers:** Navigate to the "Run Masters" Layer.

| Layers: | ○ Trips | ● Run Masters | ○ Run Covers |

6. **Bell Time Views:** The school and selected Bell Time will appear in the Data Panel; all Runs, Checkpoints and Stops for that School and Bell Time will load in the Data Panel.

Bell Time Views

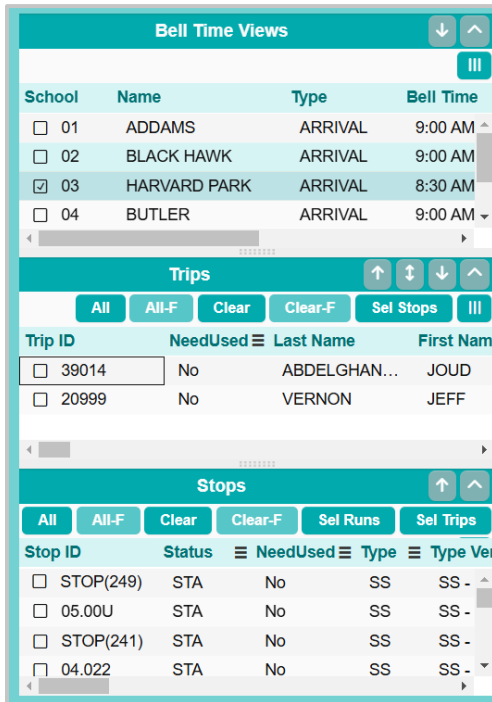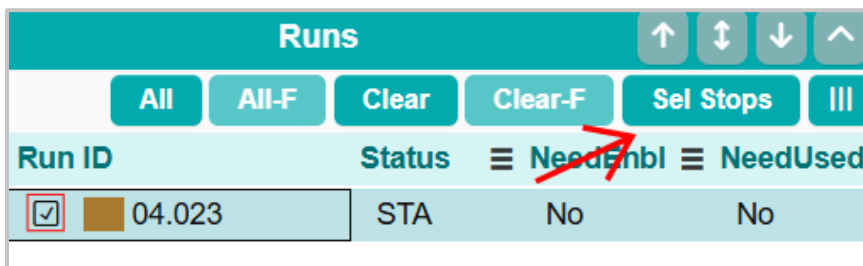| School	Name	Type	Bell Time
☐ 01	ADDAMS	ARRIVAL	9:00 AM
☐ 02	BLACK HAWK	ARRIVAL	9:00 AM
☑ 03	HARVARD PARK	ARRIVAL	8:30 AM
☐ 04	BUTLER	ARRIVAL	9:00 AM

Trips

All | All-F | Clear | Clear-F | Sel Stops

Trip ID	NeedUsed ≡	Last Name	First Nam
☐ 39014	No	ABDELGHAN…	JOUD
☐ 20999	No	VERNON	JEFF

Stops

All | All-F | Clear | Clear-F | Sel Runs | Sel Trips

Stop ID	Status	≡ NeedUsed ≡	Type ≡	Type Ver
☐ STOP(249)	STA	No	SS	SS -
☐ 05.00U	STA	No	SS	SS -
☐ STOP(241)	STA	No	SS	SS -
☐ 04.022	STA	No	SS	SS -

7. **Select Runs**

Select the Runs in the Data Panel; to select all of the checkpoints/stops for the Runs, use the "Sel Stops" button at the top of the "Runs" card.

Runs

All | All-F | Clear | Clear-F | Sel Stops

Run ID	Status	≡ NeedEnbl ≡	NeedUsed
☑ ■ 04.023	STA	No	No

a. Once you have selected the Runs and the "Sel Stops", the data will populate graphically on the Map Panel.
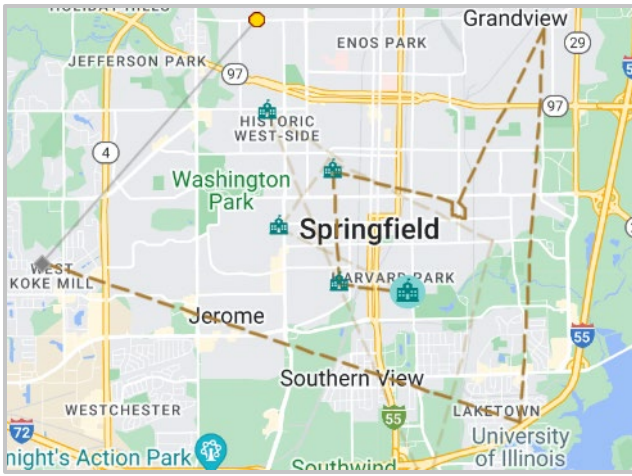
8. **Query Checkpoints Tool**

   Navigate to the Tool Bar located in the upper left corner of the Maps Panel; select the Query Stop Locations Tool. Stops and Checkpoints will both be checked automatically, select the drop down arrow next to the query tool to change selection to Checkpoints only.
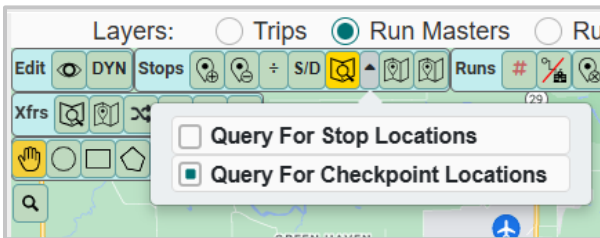
   a. Select the Draw Circle Tool and draw the diameter on the map; left click where you want the center of your circle, hold the click and move outward from the center; once you have drawn your circle, release the click.
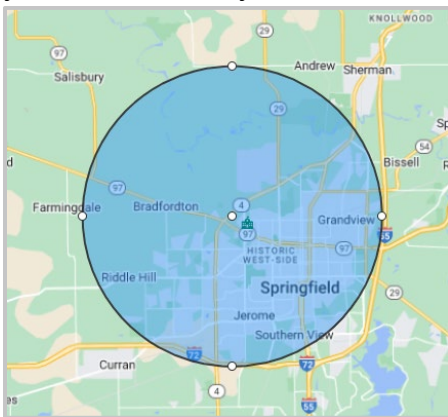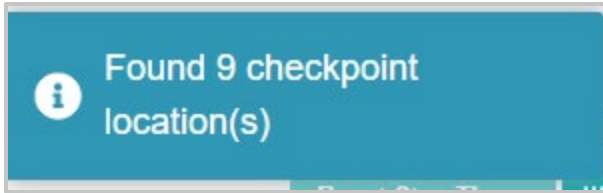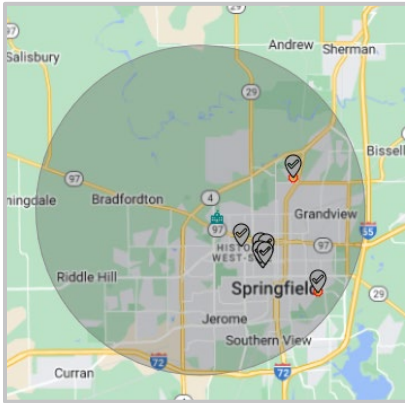

   - Select the check mark to search.

   - A dialogue will open at the top right of the screen with search results.
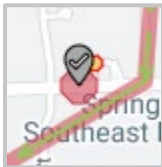
- All Checkpoint locations that were found will populate within the drawn circle.
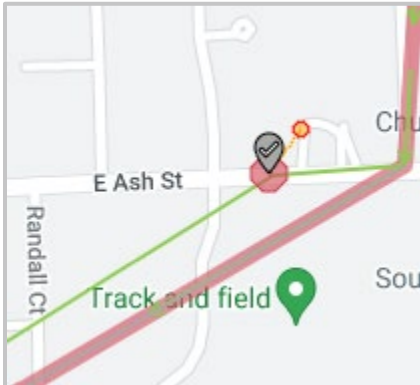

9. **Assign Stop**

   Zoom in to your Checkpoint Location and select your Run on the map.

   a. Drag the run to the checkpoint by holding down the "Ctrl" key while holding your left mouse click; drag the run to the stop and release your mouse click when you are on the Stop Request.

10. **Confirm Changes**

    A confirmation window will appear; select proceed to confirm.

Confirm this change?

Insert 01.021 on run 04.023

Before

Run	Vehicle	Frequency	Load	Duration	Distance
☐ 04.023		MTWUF	14		
☐		MTWUF	14	2h 56...	37.61 mi

After

Run	Vehicle	Frequency	Load	Duration	Distance
☐ 04.023		MTWUF	15		
☐		MTWUF	15	3h 21...	48.31 mi

WARNINGS

The Max Duration of a run will be exceeded

WARNING DETAILS

04.023, MTWUF will exceed its Max Duration of 1s by 3h 21m 18s

✓ Proceed   Cancel   Show Maps ⌄

a. Once confirming the checkpoint belongs on the run, the checkpoint icon will turn blue and become a Checkpoint Service.
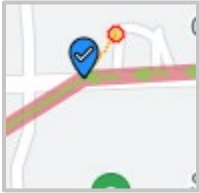
11. Save

Once checkpoints have been assigned to runs, click the "Save" button underneath the task name

testcp

💾 Save   ⊠ Close

For more information about the Bell Times Module, please reference the Bell Times Run Masters Training Guide.