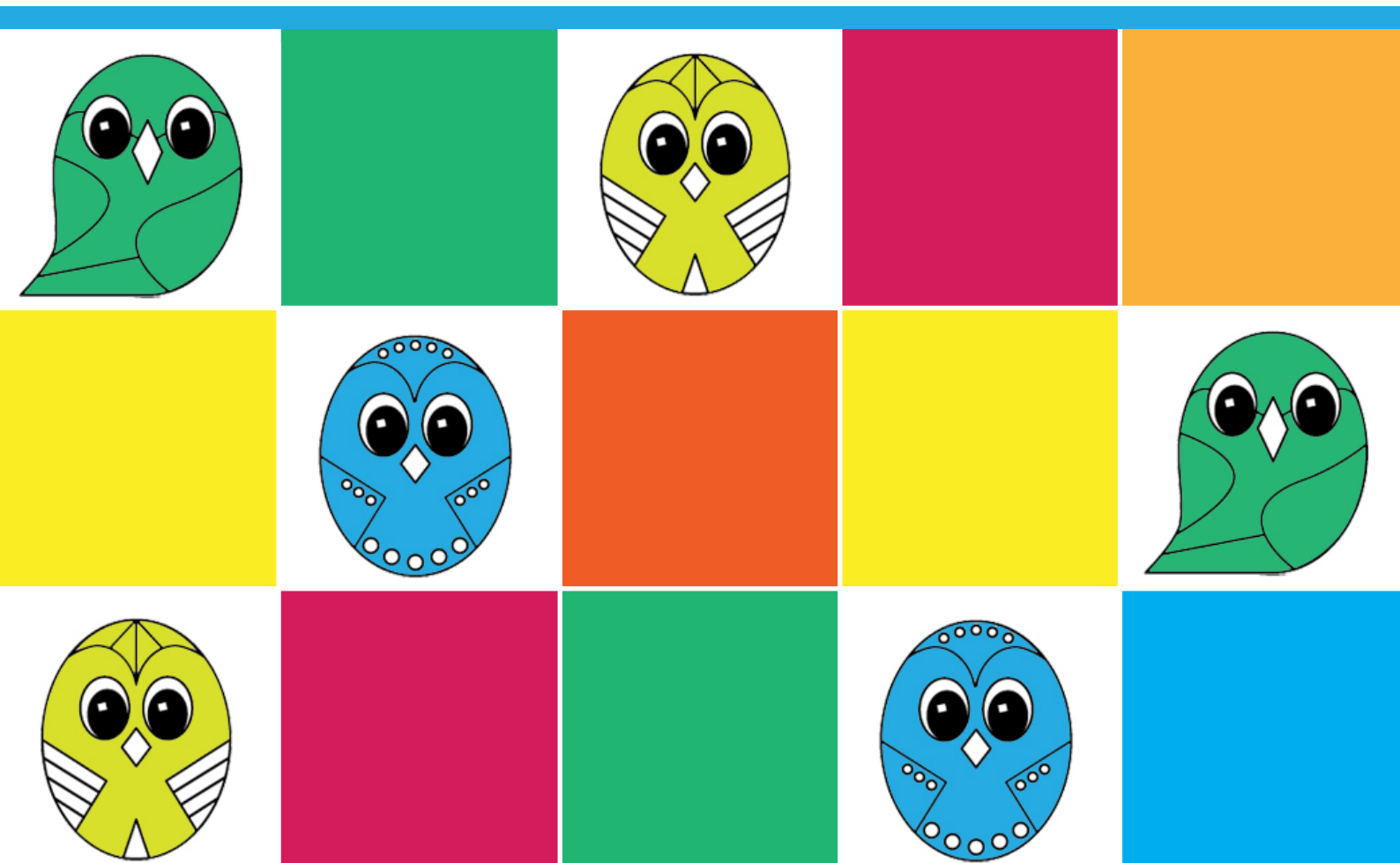


# Athena MIS & RAIL Getting Started



## Initial Set Up

Athena MIS is a cloud based application providing your company with its own secure database with unlimited access and unlimited users. However, the system is completely empty of data at the start.

This document provides a step by step process on how to set up your Athena MIS & RAIL to get you up and running as quickly and efficiently as possible.

The [Athena MIS You Tube channel](#) has a whole host of 'How To...' videos to help you in each aspect of your data management.

For the most efficient way to fully take advantage of all the tracking and reporting facilities built into Athena, it is advisable to take the following steps prior to learner data input:

1. Input your company UKPRN number by using the My Company button under System Settings in the Sidebar.
2. Create the user accounts you require, including all assessors and IQA's, even if they may not login to Athena, as you need them to populate various list boxes throughout the system.
3. Input the employers you currently work with using the Add Employers button in the Sidebar.
4. Input your current funding providers using Add Funding Providers button on the Sidebar.
5. Input your active contracts using the Add Contracts button in the Sidebar.
6. Add all the courses you deliver by building them in Course Management tools in the Sidebar.
7. Create your cohorts and assign your courses. Decide on a useful naming convention such as:
  - a. AppL2\_Helen\_16-17
  - b. WPL\_DipL4\_2016/17
  - c. App\_Cohort1\_2016-17

This will make searching and management of your learners more efficient.

Once all of the above data is in place you will have no difficulty when adding learners and you can then use the 'How to.' videos for step by step instructions for specific tasks.

If there isn't a video available for what you want to do simply send an email request to [lynn@cleverclogsmultimedia.com](mailto:lynn@cleverclogsmultimedia.com), and under normal circumstances, there will be a video created in a matter of a few hours.

## Overview

Creating a Candidate Record:

1. Sidebar – Candidate tab, Click Add
2. Select candidate type – Click appropriate learner type icon.

**Note:** All learner types are enabled/disabled in System Settings.

3. General Info tab is launched – To create a new candidate record, of any learner type, the following mandatory data MUST first be entered:
  - a. Unique Learner Number (There is the ability to generate a temporary ULN)
  - b. Title
  - c. First Name
  - d. Last Name
  - e. Date of Birth
  - f. Address fields
  - g. Post Code
  - h. Telephone number
  - i. National Insurance Number (Enter NINO here until a correct NI number is given).

Click the Save button on the Ribbonbar to create the basic learner record. The other tabs in the learner profile are now enabled.

The learner will no be accessible from the Dashboard graphs, be sure to filter by learner type.

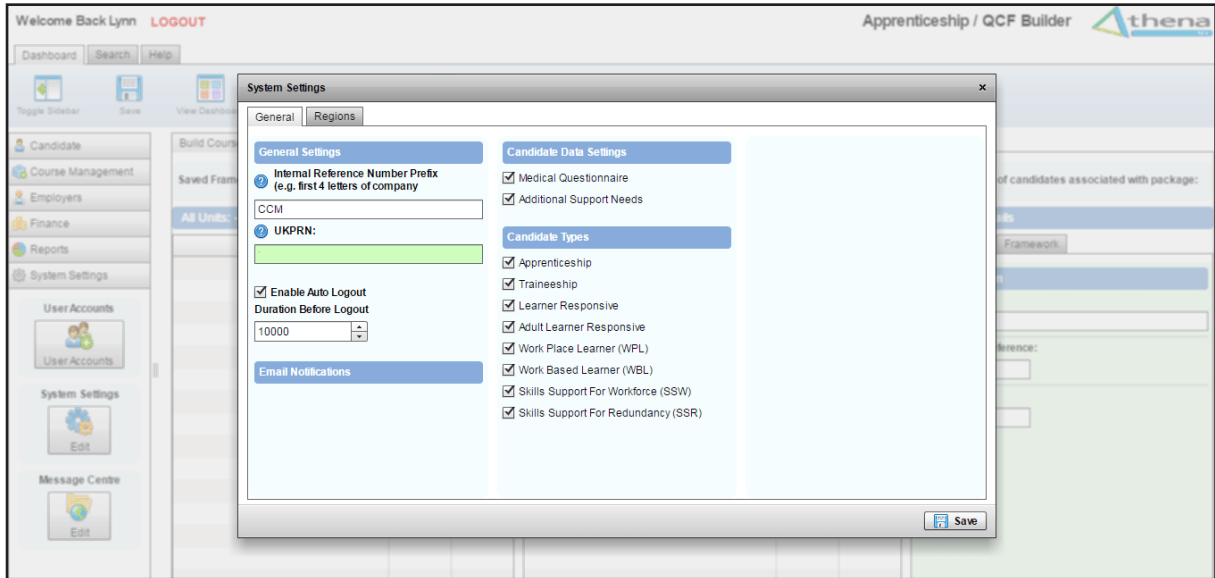
## Athena Dashboard

The screenshot shows the Athena Dashboard interface. At the top, it says "Welcome Back Lynn" and "Apprenticeship Athena". There is a "LOGOUT" button and a "Help" tab highlighted with a red box and the text "This is the Help tab with all the videos." Below the navigation bar, there is a "Ribbonbar" with "Toggle Sidebar" and "View Dashboard" buttons, and the text "This is the Ribbonbar" and "Athena Rail". The main content area is divided into several sections:

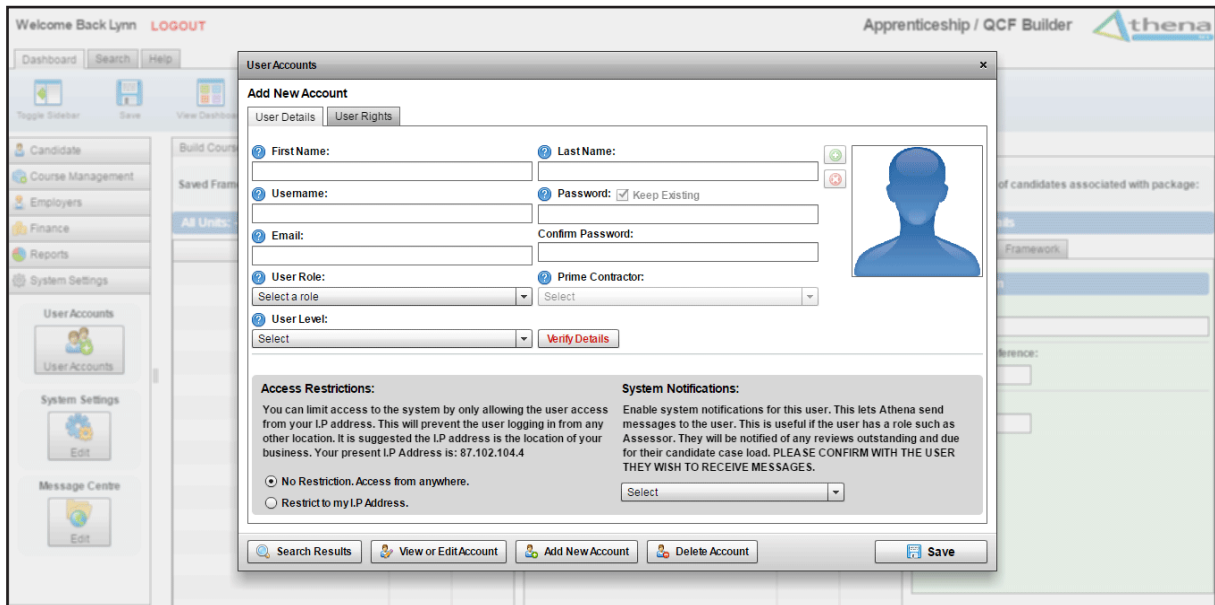
- Outstanding Candidate Profile Data:** A bar chart showing data for General, Learning Delivery, Funding and Monitoring, and ERR. A "Basic Missing Data" table lists fields like NI Number, LRN, Tel Number, Prior Attainment, Literacy Level, Numeracy Level, ICT Level, Response, Employer ID, and Learning Aim Ref.
- Candidates Due To Complete By Month:** A bar chart showing data for Aug 2016, Jan 2017, Mar 2017, and May 2017.
- Candidate Statistics:** A pie chart showing various status categories like Ready For Enrolment, Pending, Returns, Declined, etc.
- Reviews Due:** A pie chart showing review due dates like Overdue, Today, One Day, Two Days, etc.
- Certification and IQA:** A pie chart showing certification and IQA status like Not OCF Registered, Needing IQA, IQA Complete, etc.

The sidebar on the left is highlighted with a red box and the text "This is the Sidebar". It contains navigation options like "Candidate", "Course Management", "Employers", "Finance", "Reports", "System Settings", "User Accounts", and "Message Centre".

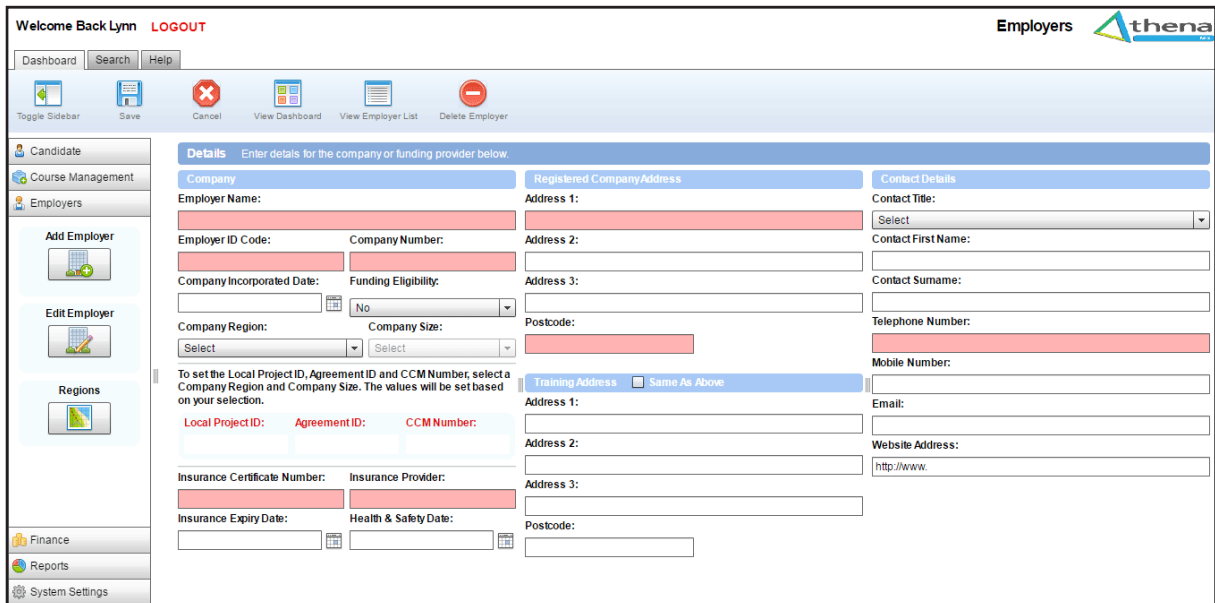
## System Settings - My Company



## System Settings - User Accounts



## Employers



## Finance - Funding Providers

Welcome Back Lynn **LOGOUT** Employers

Dashboard Search Help

Toggle Sidebar Save Cancel View Dashboard View Employer List Delete Employer

**Details** Enter details for the company or funding provider below.

<b>Company</b>		<b>Registered Company Address</b>		<b>Contact Details</b>	
Provider Name:		Address 1:		Contact Title:	Select
Provider ID Code:	Company Number:	Address 2:		Contact First Name:	
Company Incorporated Date:	Funding Eligibility:	Address 3:		Contact Surname:	
Company Region:	Company Size:	Postcode:		Telephone Number:	
To set the Local Project ID, Agreement ID and CCM Number, select Company Region and Company Size. The values will be set based on your selection.		<b>Training Address</b> <input type="checkbox"/> Same As Above		Mobile Number:	
Local Project ID:	Agreement ID:	CCM Number:	Address 1:	Email:	
Insurance Certificate Number:	Insurance Provider:	Address 2:	Website Address:		
Insurance Expiry Date:	Health & Safety Date:	Address 3:	http://www.		
		Postcode:			

## Finance - Contracts

Welcome Back Lynn **LOGOUT** Contracts

Dashboard Search Help

Toggle Sidebar Save Cancel View Dashboard View Contract List

**Add Contract** Enter details for the contract below.

Total Invoiced: Total Received: Total Outstanding:

<b>General</b>	<b>Dates</b>	<b>Candidate Age Groups</b>	<b>Contract Values</b>
Contract Name:	Start Date:	Expected	16 - 18 Value:
Contract Number:	Expected End Date:	Actual	19 - 23 Value:
Contract Status:	Actual End Date:	16 - 18:	24+ Value:
Contract Type:	Duration (days):	19 - 23:	Total Contract Value:
Contract Sector:	Elapsed (days):	24+:	
Primary Contract:	Remaining (days):	Total:	

## Course Management - Apprenticeship / QCF Builder

Welcome Back Lynn **LOGOUT** Apprenticeship / QCF Builder

LARS Search

Search Selected Course Details

**Search Criteria**

Search Type: Apprenticeships

Programme Type: Select

Apprenticeship Standard

Title: business

Code:

Courses				Learning Aims		Functional Skills	
Title	Code	Path		Title	LAR	Title	LAR
Business Administration - Advanced Apprenticeship (Level 3)	102	0		NVQ in Business and Administration	10051983	Functional Skills Qualification in Maths at Level 2	60133533
Business Administration - Intermediate Apprenticeship (Level 2)	102	0		Certificate in Business and Administration (Organisations and People)	10052148	GCSE (9-1) in English Language	60145055
Business and Administration - Advanced Apprenticeship (Level 3)	490	0		NVQ in Business and Administration	10052173	Functional Skills Qualification in English at Level 1	60176738
Business and Administration - Advanced Apprenticeship (Level 3)	490	1		NVQ in Business and Administration	1005618X	Functional Skills Qualification in English at Level 2	6017674X
Business and Administration - Advanced Apprenticeship (Level 3)	490	2		NVQ in Business and Administration	10056671	Functional Skills Qualification in Mathematics at Level 1	60176751
Business and Administration - Advanced Apprenticeship (Level 3)	490	3		BTEC Diploma in Business Administration	10060947	Functional Skills Qualification in Mathematics at Level 2	60176763
Business and Administration - Higher Apprenticeship (Level 4)	490	0		NVQ in Business and Administration	50015187	Functional Skills Qualification in English at Entry 1	60178516
Business and Administration - Higher Apprenticeship (Level 4)	490	1		Certificate for Legal Secretaries	50017445	Functional Skills Qualification in English at Entry 2	60178528
Business and Administration - Higher Level Apprenticeship	490	0		Certificate in Business and Administration	50017895	Functional Skills Qualification in English at Entry 3	6017853X
Business and Administration - Intermediate Apprenticeship (Level 2)	490	0		BTEC Certificate in Business Administration	50040005	Functional Skills Qualification in English at Level 1	60178541
Business and Administration - Intermediate Apprenticeship (Level 2)	490	1		NVQ in Business and Administration	50062499	Functional Skills Qualification in English at Level 2	60178553
Business and Administration -	490	2		Diploma in Medical Administration (QCF)	50066948	Functional Skills Qualification in Mathematics at Entry 1	60178565
				Certificate for Legal Secretaries (QCF)	50067497		
				Certificate in Principles of Business and Administration (QCF)	50092455		
				NVQ Certificate in Business and Administration (QCF)	50093009		

Build Course

## Candidate - Cohort Manager

Welcome Back Lynn **LOGOUT** Contracts

Dashboard Search Help

Toggle Sidebar Save Cancel View Dashboard View Contract List

**Candidate**

**Add Contract** Enter details for the contract below.

Total Invoiced: Total Received: Total Outstanding:

General	Dates	Candidate Age Groups	Contract Values
Contract Name: <input type="text"/>	Start Date: <input type="text"/>	Expected: <input type="text"/>	Actual: <input type="text"/>
Contract Number: <input type="text"/>	Expected End Date: <input type="text"/>	16 - 18: <input type="text"/>	16 - 18: <input type="text"/>
Contract Status: <input type="text"/>	Actual End Date: <input type="text"/>	19 - 23: <input type="text"/>	19 - 23: <input type="text"/>
Contract Type: <input type="text"/>	Duration (days): <input type="text"/>	24+: <input type="text"/>	24+: <input type="text"/>
Contract Sector: <input type="text"/>	Elapsed (days): <input type="text"/>	Total: <input type="text"/>	Total: <input type="text"/>
Primary Contractor: <input type="text"/>	Remaining (days): <input type="text"/>		
			16 - 18 Value: <input type="text"/>
			19 - 23 Value: <input type="text"/>
			24+ Value: <input type="text"/>
			Total Contract Value: <input type="text"/>

## Candidate - Add Candidate

Welcome Back Lynn **LOGOUT** Create Candidate Record

Dashboard Search Help

Toggle Sidebar View Dashboard

**Candidate**

Create Candidate Add

Cohort Manager Add/Edit

Export & Cohort History View

Course Management Employers Finance Reports System Settings

Select the type of Candidate you wish to create a record for from the options below:

Apprentice	Traineeship	Learner Responsive	Adult Learner Responsive
Work Place Learner (WPL)	Work Based Learner (WBL)	Skills Support For The Workforce (SSW)	Skills Support For Redundancy (SSR)

## Candidate - Candidate Profile

Welcome Back Lynn **LOGOUT** Apprentice

Dashboard Search Help

Toggle Sidebar Save Cancel View Dashboard Add/Edit NOK Update ULN Edit Notifications Unlock Fields Export ILR Record Status ASN Assessment

**Candidate**

Create Candidate Add

Cohort Manager Add/Edit

Export & Cohort History View

Course Management Employers Finance Reports System Settings

General Initial Assessment Learning Delivery Review Functional Skills Funding & Monitoring Employment ERR & PLTS Notes Feedback

Unique Learner Number: Cohort Group: Funding / Enrolment Year: Prime Contractor: Learner Reference Number / Internal Reference Number:

Title: First Name: Telephone Number: LLD Health Problems: Does the learner have any long term disability, health problem or any learning difficulties?

Last Name: Mobile Number: Health Problem:

Date Of Birth: DD-MM-YYYY Age: Address 1: Learning Difficulty:

Gender: Address 2: Special Educational Needs (SEN):

Ethnicity: Address 3: High Needs Student (HNS):

NI Number: Type NINO if not available: Town: Self Declaration of Eligibility:

Email Address: Postcode: Region Group:

Completion Status

Time Complete 0%

Total Units: Completed Units: Units Complete 0%