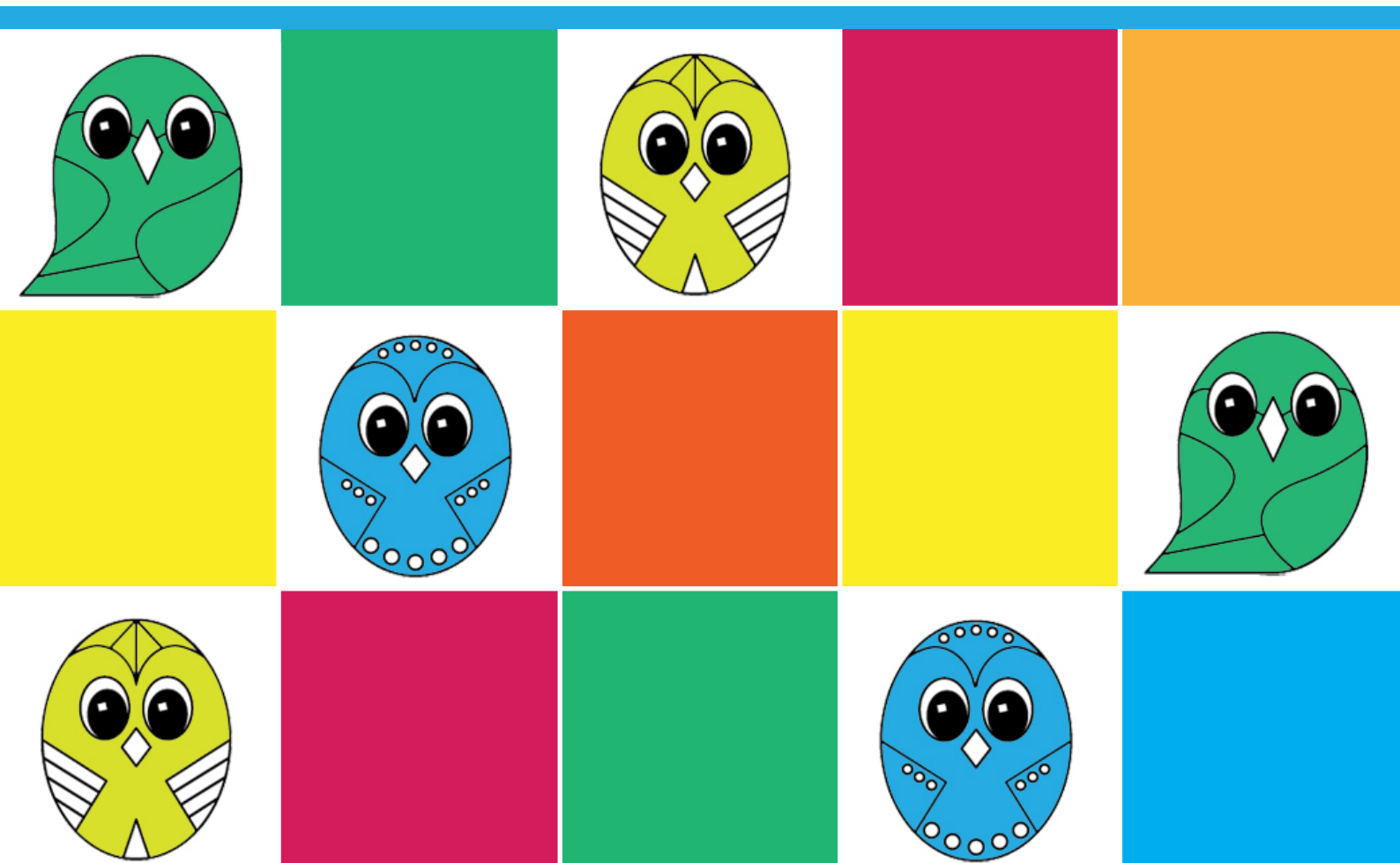# Athena MIS & RAIL
Getting Started

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 couses. 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, 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

System Settings - My Company
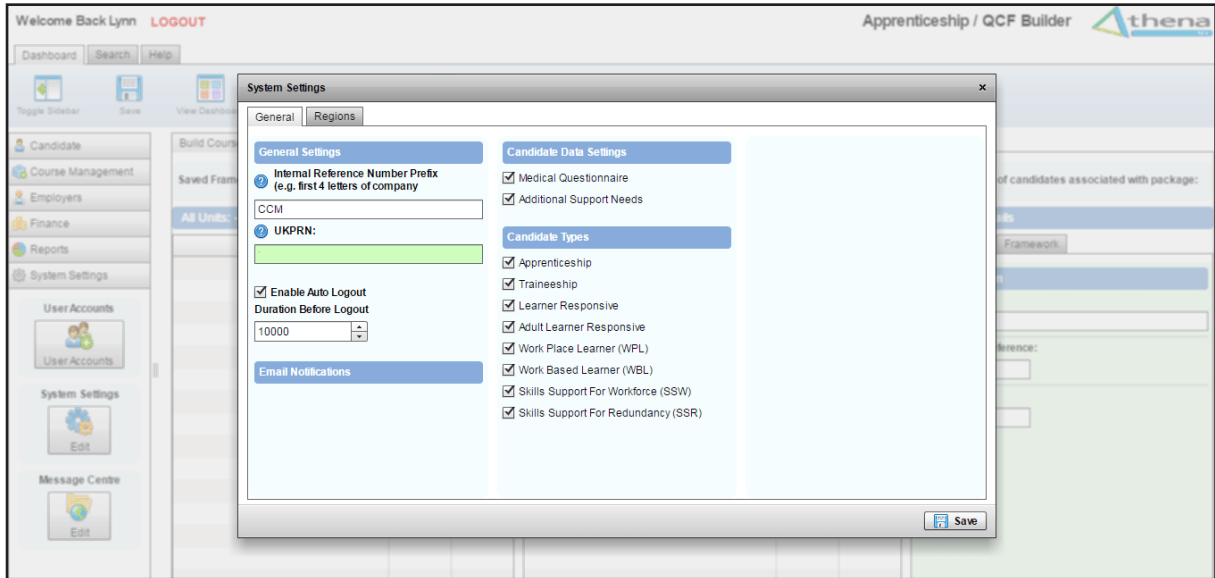
System Settings - User Accounts
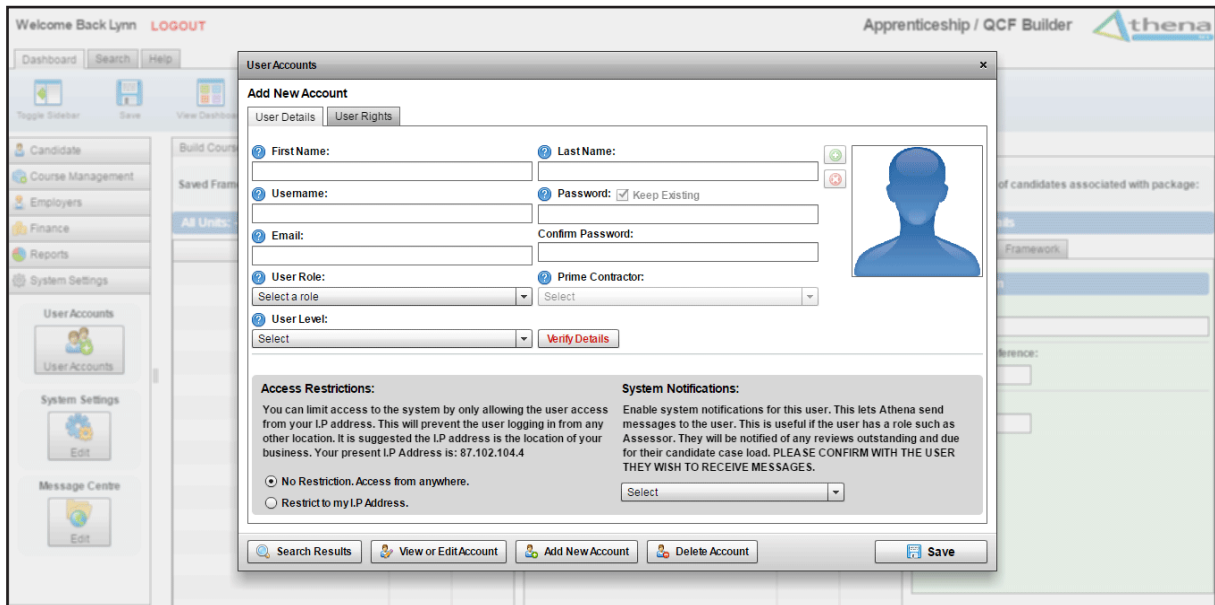
Employers
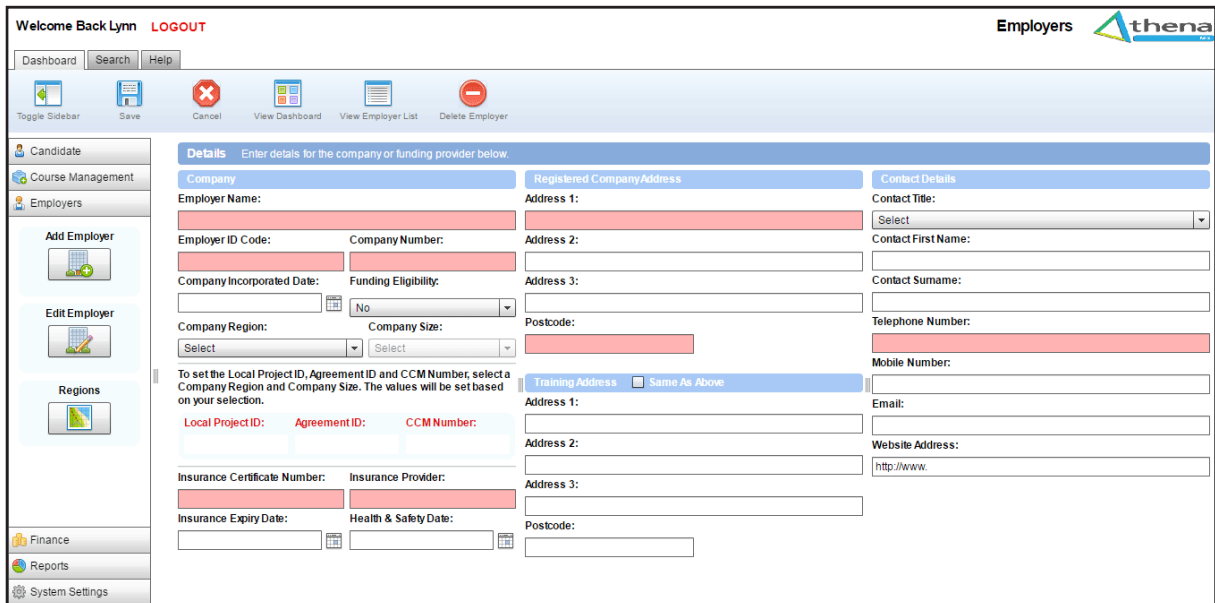
Finance – Funding Providers

Finance – Contracts

Course Management – Apprenticeship / QCF Builder

Candidate - Cohort Manager

Candidate - Add Candidate

Candidate - Candidate Profile