

Accessing Ahlers & Associates Data Online

First Steps (for every option)

1. Go to www.ahlerssoftware.com and click on **Client Login** on the left. (Click **OK** if you get a Security Alert pop-up.)
2. Enter your username and password, and click the gray **Logon** button.

Looking at the standard reports

1. Click on **View Reports** – the first option under the heading Available Remote Services. You may have to wait a minute for the next page to load.
2. Select the location for which you want to see a report. If you have agency/project-level access, you can choose to see data for the whole agency, or you can click on the drop-down menu to choose to see data for a particular clinic.
3. Scroll down the list of available report batches and time periods to find the one you want. If you'd like to see all tables in that report batch, simply click on the report batch name. If you are interested in a particular table within the report batch, click on the plus (+) sign next to the report name, find the table you want, and click on that to open.
4. Once you have a report open, note that you can print it by clicking **Print** under the **Choose Report Action** at the top of the page. (Do Print Preview first to make sure your page is set up correctly and that you won't end up printing more of the report than you need.) To open a different report for the same agency or clinic, click on **Return to Report Options** (very top of the page), which will take you back to the list of available report batches and time periods. To open the same report for the state, the agency or the clinic, click the appropriate option under the **View Report For** (at the right of the page). Finally, you can go to the custom report builder (see below) by clicking on **Return to Report Options** at the very top of the page.

Creating your own reports

If you want to create your own report, you have two options: (1) build a simple report online or (2) download raw data to construct a custom report on your own computer.

Build a report:

1. Once you've entered the secure portion of the Ahlers website, click on **Build a Report**, the third option listed under Available Remote Services on the left hand side of the page.

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2. From the list of available locations, select the agency or clinic for which you want to generate a report. Click on the agency name to build an agency-level report or you can click on the drop-down menu to choose to see data for a particular clinic.
3. Indicate the time period for which you would like to get data, entering the starting date in the box on the left and the ending date in the box on the right. You may also select a pre-determined time period under **Select a Specific Time Period**.
4. Below that, there are two lists of fields that can be included in your table. Choose (by clicking on the different options) what information you'd like to see down the left side (the rows) and what you'd like to see across the top (the columns).
5. Finally, click on the gray **Continue to Build a Report** button at the bottom of your screen.
6. The report should be generated in a few moments. There will be 2 different sections: the top will show the information you requested in terms of Visit Totals; the bottom half will show the same information in terms of Unduplicated (client) Totals.
7. At the top right hand portion of the report you have the option to view the report for the same time period, the previous year, or you can choose to limit the report to male or female clients only.
8. The two columns on the right of the charts allow you to view the data in bar or pie chart formats. Simply click on the words **Bar** or **Pie** to view the data in these formats.
9. To see client specific data for a particular cell, you can click on the cell of interest to generate a drilldown table that includes such data as Project, Clinic, Patient, Visit Date, and Patient Birth Date. To export this drilldown data to Excel, click on **Export Drilldown Data to Excel**. The Excel spreadsheet with the data will be placed in your **Receive Files** folder. To access this folder, click on **Return to Report Options** at the very top of the page. Then click on Receive Files on the left hand side of the page (the sixth option listed under Available Remote Services).

Download data:

1. Once you've entered the secure portion of the Ahlers website, click on **Extract Data to Download**, the fifth option listed under Available Remote Services on the left hand side of the page.
2. From the list of available locations, select the agency or clinic for which you want to generate a report. Click on the agency name to build an agency-level

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- report or you can click on the drop-down menu to choose data for a particular clinic.
3. Indicate the time period for which you would like to get data, entering the starting date in the box on the left and the ending date in the box on the right. You may also select a pre-determined time period under **Select a Specific Time Period**.
 4. Click on the **Continue to Extraction** button at the bottom of the page. The file should be extracted momentarily and you will automatically be taken to the **Receive Files** page.
 5. You will see a list of files you've created. Look for the file you want and click on that file to start the download process. (You can open the file first or save it to your computer directly.)