Accessing Ahlers & Associates Data Online

<u>First Steps</u> (for every option)

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

<u>Looking at the standard reports</u>

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 plus (+) sign next to the agency name 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 choosing **Click here to print this report** in the top left-hand corner 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 **Select Reports** (second from the left on the top), which will take you back to the list of available report batches and time periods. To open the same report for a different agency or clinic, click on **Select Projects/Clinics** (second from the right on the top), which will take you back to the list of agencies and clinics. Finally, you can go to the custom report builder (see below) by choosing **Generate Reports** in the top right-hand corner.

<u>Creating your own reports</u>

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. The first steps for these options are the same:

1. Once you've entered the secure portion of the Ahlers website, click on **Extract Data to Build a Report or to Download**, which is the second option listed under Available Remote Services.
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 hit the plus (+) sign next to the agency name to pick a particular clinic.
3. On the next page, 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. Then hit the gray **Accept the dates** button at the bottom of the screen.

At this point, the two custom options diverge:

Building reports online	Downloading data
4. Click on the **Build a Report** option at the bottom of the list you see. 5. The next page will give you 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). 6. Then choose whether you'd like the information for female clients, male clients, or both, and if you'd like to see the information for the same period last year. 7. Finally, click on the gray **Generate the Report** button at the bottom of your screen. 8. 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.	4. Choose to receive the data as a Comma Separated Values (CSV) file; the other formats are no longer supported. 5. The file generation process may take a while if you specified a large date range in Step 4 above. Once it's done, you will be taken back to the page entitled Available Remote Services. Click on the **Receive Files** heading (3rd one down). 6. You will see a list of files you've created in different formats. Look for the one that is in the format you want and was created on the current date. Click on that file to start the download process. (You can open the file first or save it to your computer directly.)